General User Manual

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Introduction

This document is to be used as the general user manual for executives and managers that will use the software without knowing the details of setting the gauges set up. For more detailed information about the data, parameters, indicators, and gauges refer to the Customization manual.

Dashboards

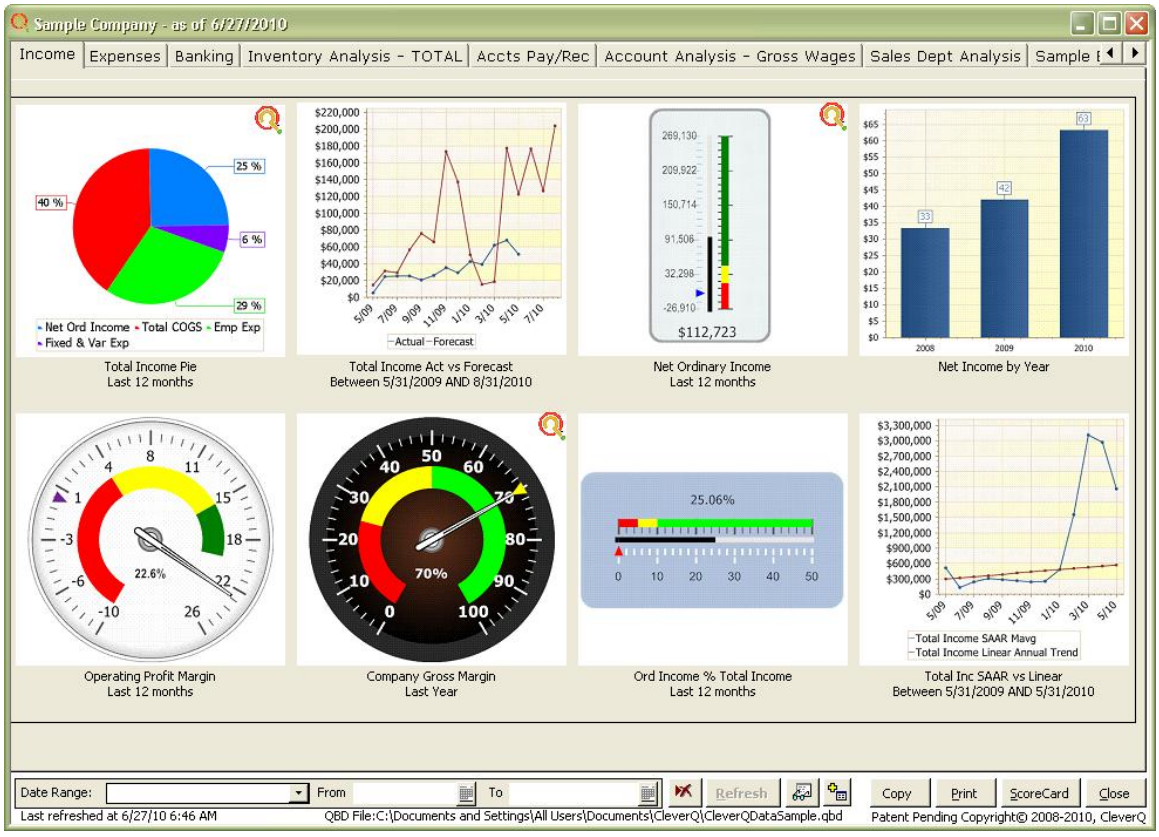
Viewing Dashboards

The main user interface for the software is the Dashboard. It automatically loads when you start the software or you can open the Dashboard by selecting one of the menu items:

View – Active Dashboards
View – Select Dashboards

When you select "Active Dashboards", the dashboard similar to the one found on the following figure is displayed. There can be up to 8 active dashboards with each one being available on a separate tab.

When you select "Select Dashboards", you will get a list of all dashboards you have access to, both active and inactive. Select a dashboard and only that one will be displayed.



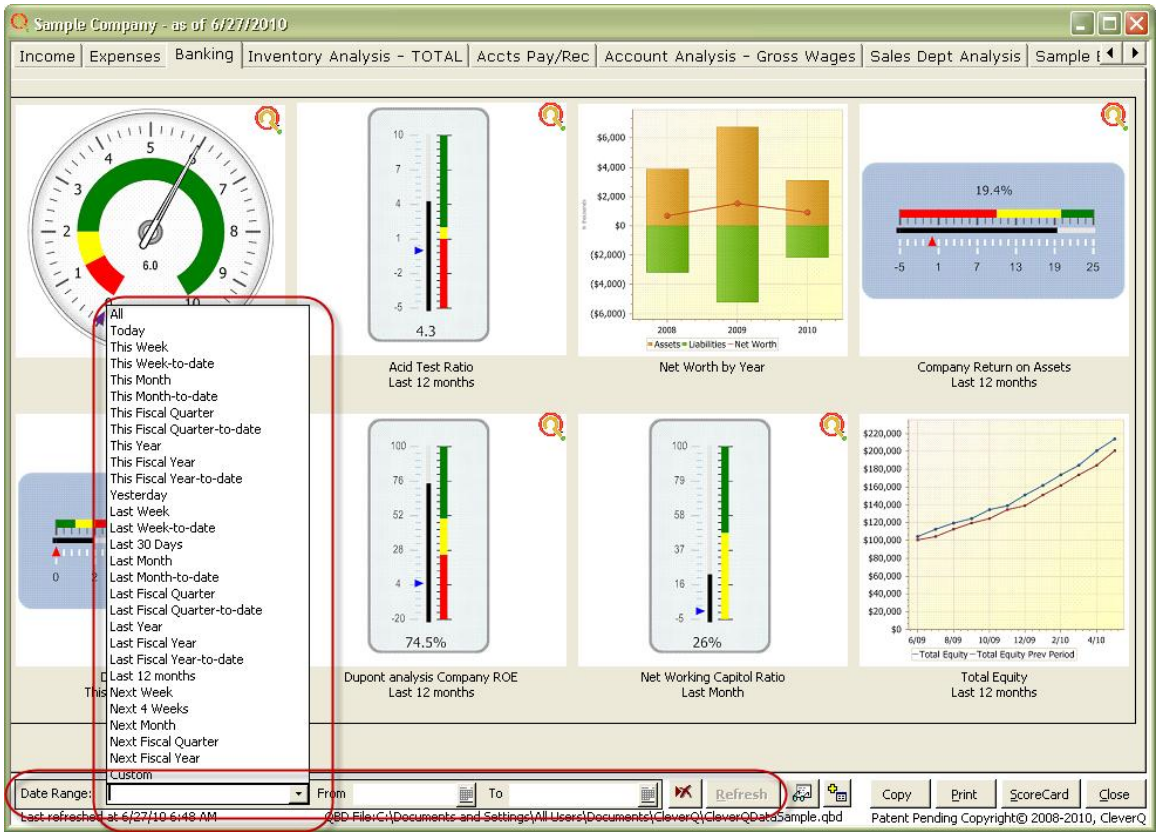
Tabs

The Active Dashboard contains 8 tabs that are selected by simply clicking on a tab with your mouse. Each tab has a name and this can be customized when setting up the dashboard. This will be covered later in this manual.

Date Ranges

A particular tab on the dashboard may have a default date range saved as part of the dashboard setup. When this occurs, each gauge will display data based on that date range. If the dashboard does not have a default date range, then the initial date range defined for the individual gauges are used. That gauge date range is displayed as part of the gauge title. When the dashboard date range is used, the gauges will not display a date range. If a gauge does not have an initial date range and the dashboard does not have a date range selected, the gauge will assume all dates.

You can change the date range of a dashboard by using the dropdown box on the bottom of the form.

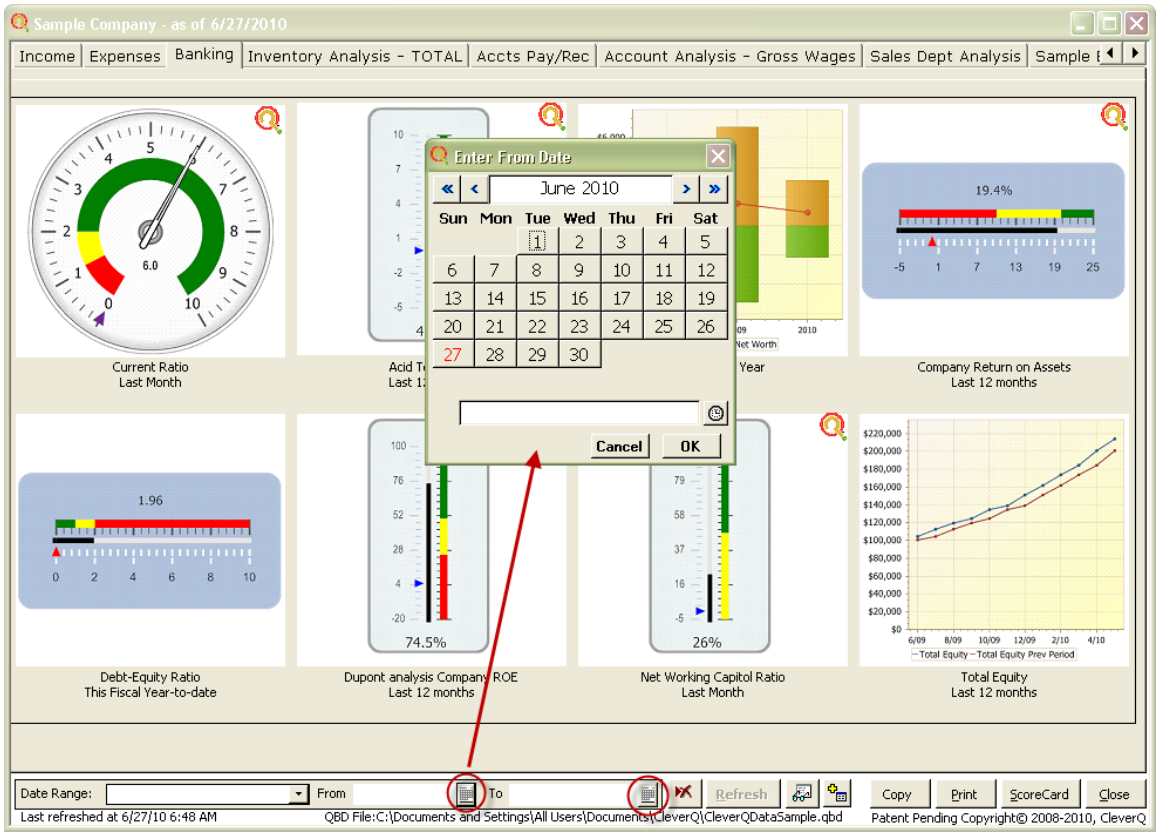


You will get a list of date ranges to choose, select one, and the "From" date and "To" date will be updated.

NOTE: You need to press the "Refresh" button to update the gauges based on the new date range.

You can also select a custom date range by pressing the small calendar buttons just to the right of the "From" date and "To" date. Pressing these buttons will display a popup calendar where you can select a date. Use the single arrow buttons to move one month either forward or backward. Use the double arrow buttons to move one year either forward or backward.

NOTE: Data is stored as Monthly, Daily, or Current. Depending on the data, one or more of these data types may or may not be available. It is important that the user have an understanding of their data and the available types and data ranges available.



To clear out the date range, press the button to the left of the Refresh button. This will clear the dates, and refresh the dashboard with the gauge's initial date range.

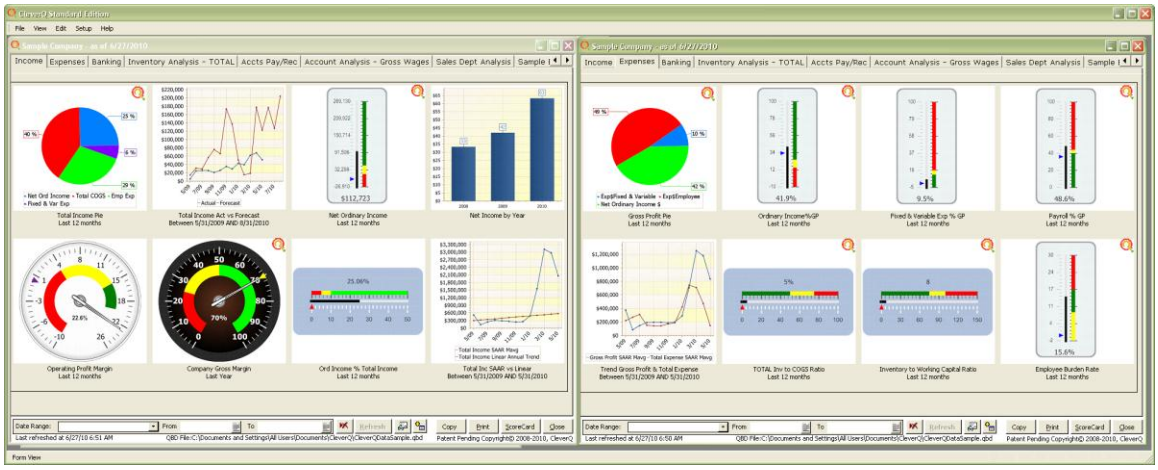
Resize

The size of the dashboard is designed to fit a typical screen. If you want to enlarge the dashboard to fit the entire screen, press the button to the right of the Refresh button.

Multiple Dashboard Windows

You can open an unlimited number of windows and view multiple dashboards at the same time. This is ideal when you have a large monitor or multiple monitors. To create

a new dashboard based on the currently selected dashboard, click the button. You will then need to manually arrange the window to suit your need.



Printing

Current Dashboard

You can print onto a single sheet of paper the current dashboard displayed by pressing the "Print" button.

ScoreCard

A ScoreCard report is available by pressing the "ScoreCard" button. This report is useful for a hardcopy of one of the tabs on the dashboard and provides something a manager can print and study. It shows the dashboards, gauges, indicators, and tips. You will first see a preview of the scorecard, then you can print or export the report.

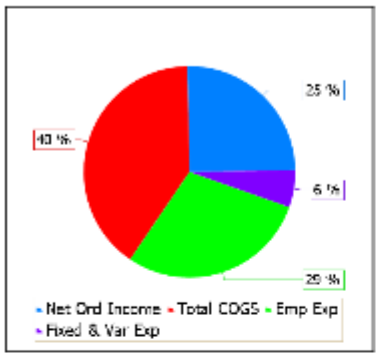
A sample page is displayed in the following figure. You can print this by right mouse clicking on the report preview.

CleverQ Reporter — Sample Company

Dashboard Num: 1 Dashboard/Scorecard Name: Income

Default Dashboard Date Range:

Gauge Location: 1 Gauge Name: Total Income Pie



Initial Date Range: Last 12 months

Current Date Range: Last 12 months

Data Type: Monthly

Filters:

☐ Lock Date Range

Ratio 1 ☐ Key Ratio

Indicator Name: Net Ordinary Income $

Indicator Formula: [Net Ordinary Income]

Current Value: $112,723

Value Details: Net Ordinary Income = 112,722.68

Benchmark: $0

Tip: Net Income meets or exceeds the goal of 25% of Gross profit.

Note: Business: Income from the normal day to day operations of the firm, and which specifically excludes income from sale of capital assets.

Ratio 2 ☐ Key Ratio

Indicator Name: COGS$Total

Indicator Formula: [Total COGS]

Current Value: $180,727

Value Details: Total COGS = 180,727.38

Benchmark: $0

Tip:

Note:

Ratio 3 ☐ Key Ratio

Indicator Name: Exp$Employee

Indicator Formula: [Total Expense Personal]

Current Value: $130,804

Value Details: Total Expense Personal = 130,804.28

Benchmark: $0

Tip:

Note:

Exporting

Clipboard

There may be times when you want to capture a view of the dashboard and paste it into another program like Word, Excel, PowerPoint, or even an Email. This can be simply done by pressing the "Copy" button on the bottom of the dashboard.

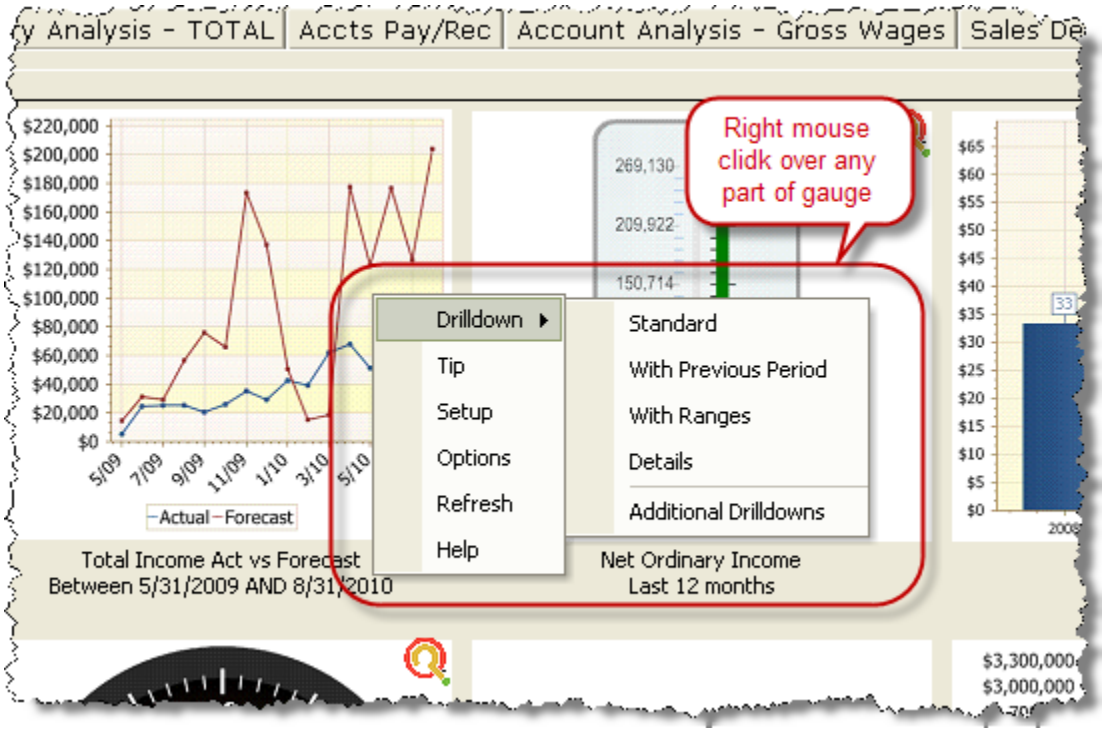
Web Page

With the Report Manager, you can save a dashboard to a webpage. This makes it possible to have dashboards part of a company website. Refer to the Report Manager User Manual for details on how to do this.

Gauges

Each dashboard tab can contain up to 8 gauges. The gauge selection and content are determined by the dashboard setup. When 3 or less gauges are defined for a dashboard, the size of the gauges will automatically adjust to the size of a dashboard.

While displaying the dashboard, you can right mouse click over a specific gauge and get a gauge submenu.



Depending on the gauge you may get different results for the various menu items.

Gauge Drilldown

Four different standard drilldowns are available for a gauge: Standard, With Previous Period, With Ranges, and Details. What you see and what is available varies for each different gauge type.

Standard Drilldown

Line Chart Drilldown

Standard drilldowns usually provide a line chart showing one or more lines with each line representing an indicator. The line chart displays the monthly or daily values over the gauges date range. For example, for a gauge like this…

…the standard drilldown will show the single indicator of "Company Gross Margin" as a line chart across the time period of "Last Year" as shown in the next figure.

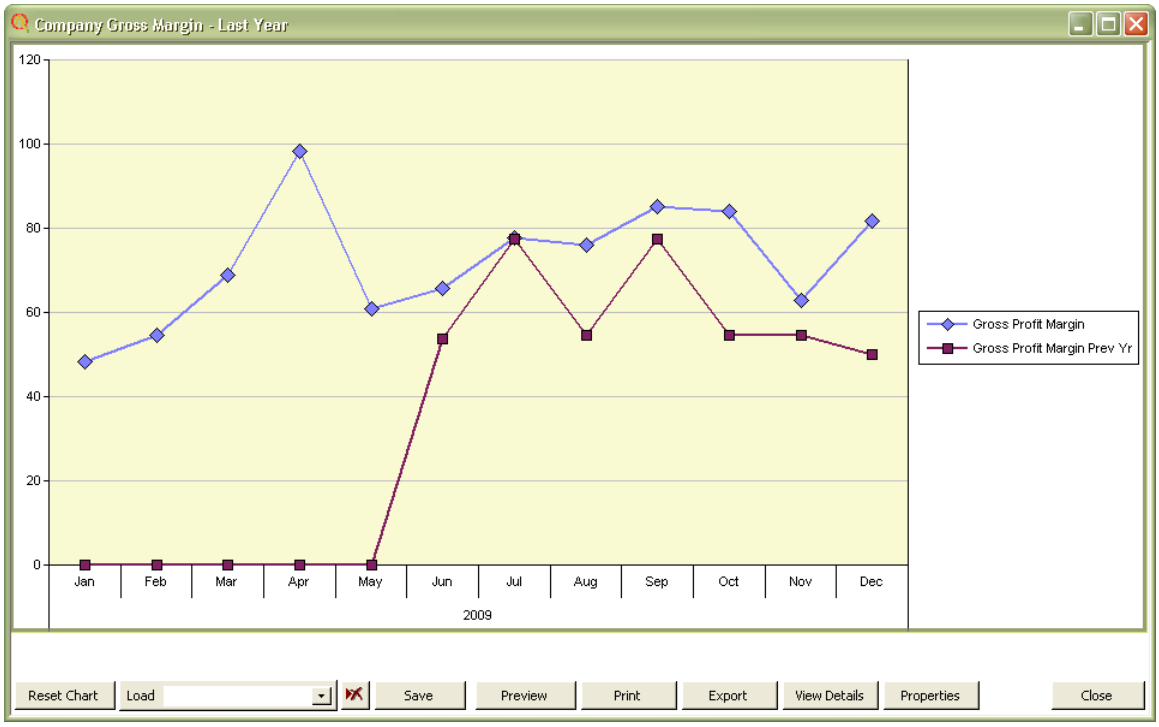
This is referred to as a "Pivot Chart" and you have several things you can do with it. This is covered in a later section of this manual.

Data Drilldown

Some gauges will drilldown into a data table. The data table will list specific records that were used to set the gauge. You might be able to further drilldown to another application if the custom interface was setup for your environment by pressing the "View Details" button. There are options with the data table to print, preview, export, and display the data as a pivot table. Working with Pivot Tables is covered in a later section of this manual.

With Previous Period Drilldown

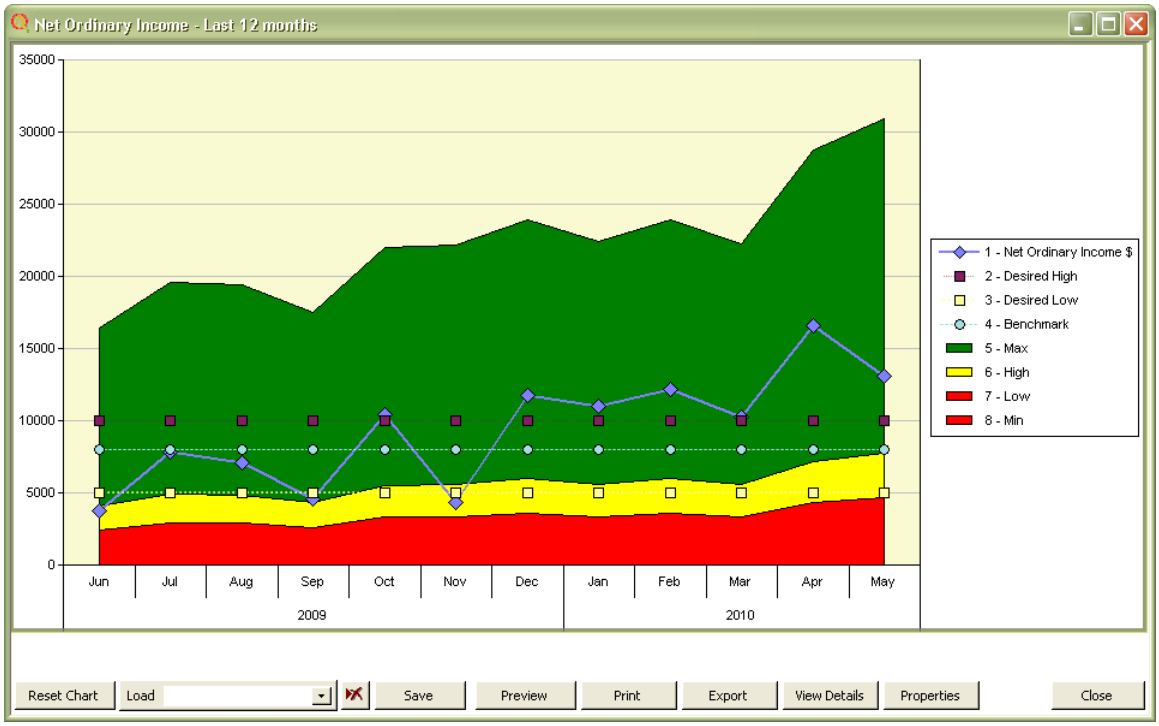
The "With Previous Period Drilldown" option generally shows a line chart or charts depending on the number of indicators, which include the data from the previous period. This would be the previous year for the case of monthly data, or the previous week for daily data. Using the example in the previous section, the result would look like this….



Note that the blue line represents the current period and the red line represents the previous year.

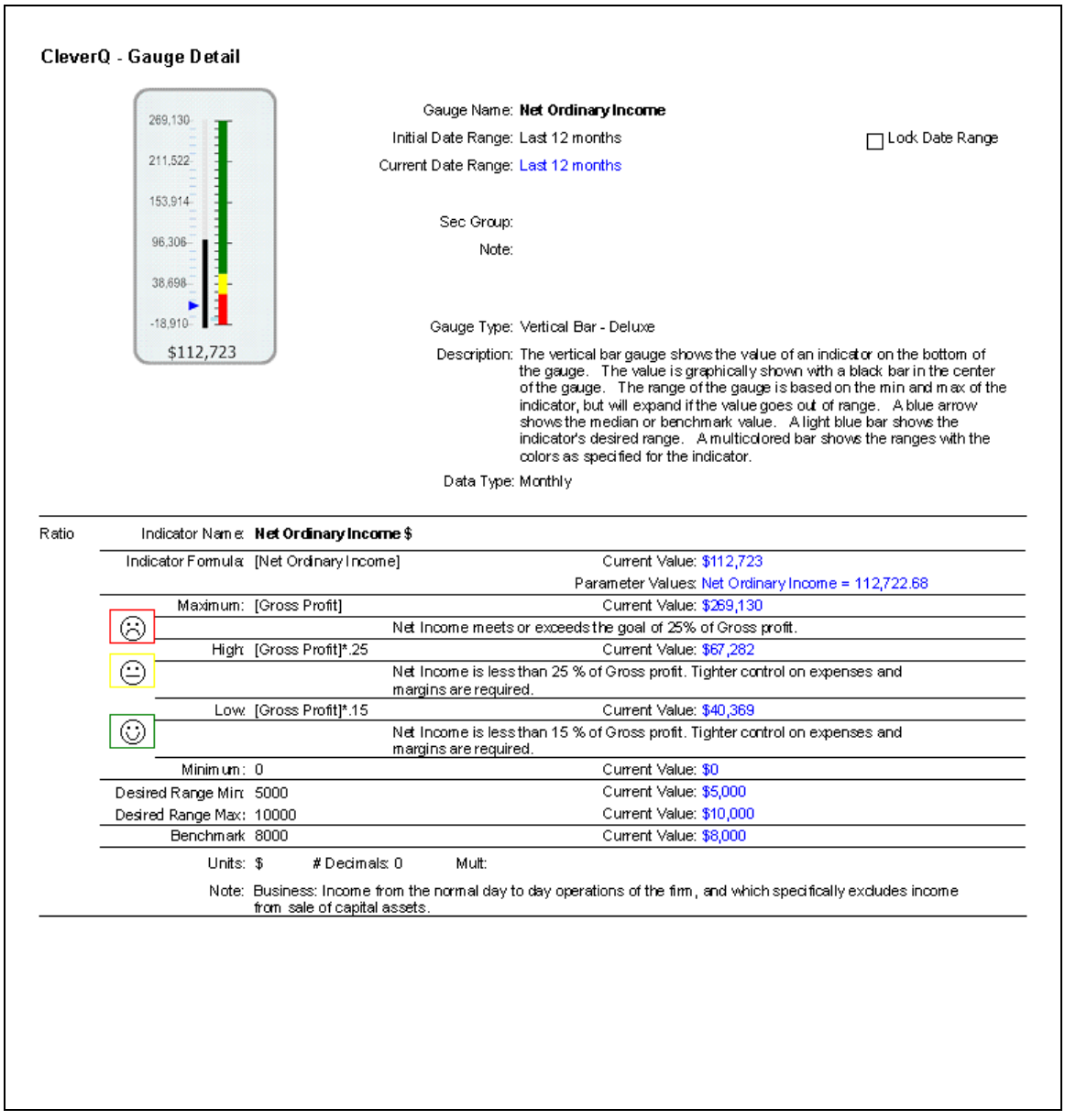
With Ranges

The “With Ranges” drilldown will display for single indicator gauges a line chart with multiple lines and areas representing the ranges setup on the indicator. The areas are colored in with the specified colors defined on the indicator.



Details Drilldown

If you choose the "Details" drilldown, you get a printable report showing the gauge, the parameters of the gauge, the indicator detail, and the values for the current view of the gauge. The current values are printed in blue. See the following figure for an example.



CleverQ - Gauge Detail

Gauge Name: **Net Ordinary Income**
Initial Date Range: Last 12 months ☐ Lock Date Range
Current Date Range: Last 12 months
Sec Group:
Note:
Gauge Type: Vertical Bar - Deluxe
Description: The vertical bar gauge shows the value of an indicator on the bottom of the gauge. The value is graphically shown with a black bar in the center of the gauge. The range of the gauge is based on the min and max of the indicator, but will expand if the value goes out of range. A blue arrow shows the median or benchmark value. A light blue bar shows the indicator's desired range. A multicolored bar shows the ranges with the colors as specified for the indicator.
Data Type: Monthly

Ratio	Indicator Name:	**Net Ordinary Income $**	
	Indicator Formula:	[Net Ordinary Income]	Current Value: $112,723
			Parameter Values: Net Ordinary Income = 112,722.68
	Maximum:	[Gross Profit]	Current Value: $269,130
☹		Net Income meets or exceeds the goal of 25% of Gross profit.	
	High:	[Gross Profit]*.25	Current Value: $67,282
😐		Net Income is less than 25 % of Gross profit. Tighter control on expenses and margins are required.	
	Low:	[Gross Profit]*.15	Current Value: $40,369
☺		Net Income is less than 15 % of Gross profit. Tighter control on expenses and margins are required.	
	Minimum:	0	Current Value: $0
	Desired Range Min:	5000	Current Value: $5,000
	Desired Range Max:	10000	Current Value: $10,000
	Benchmark:	8000	Current Value: $8,000

Units: $ # Decimals: 0 Mult:

Note: Business: Income from the normal day to day operations of the firm, and which specifically excludes income from sale of capital assets.

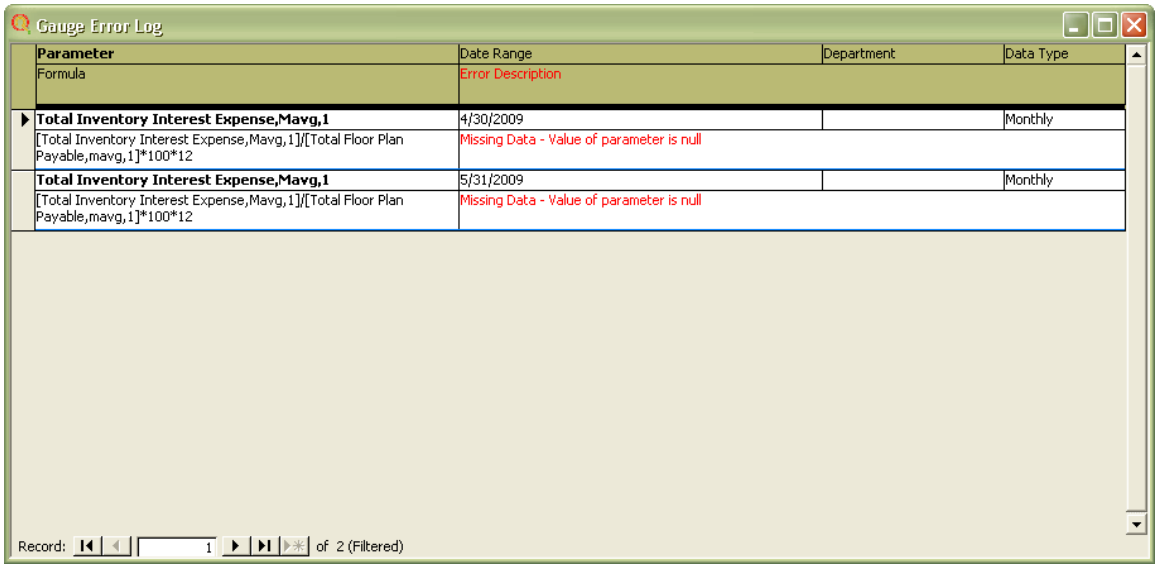
Additional Drilldowns

Some gauges might have additional drilldowns. These additional drilldowns may include another dashboard, a gauge, a report, an external file, or a webpage.

Gauge Warning

Some gauges will display an icon like this....

This is an indicator that there is an error with the data used to create the gauge. To view the error, click on the icon. A list of errors including the parameter, formula, data range, department, and data type will be listed.



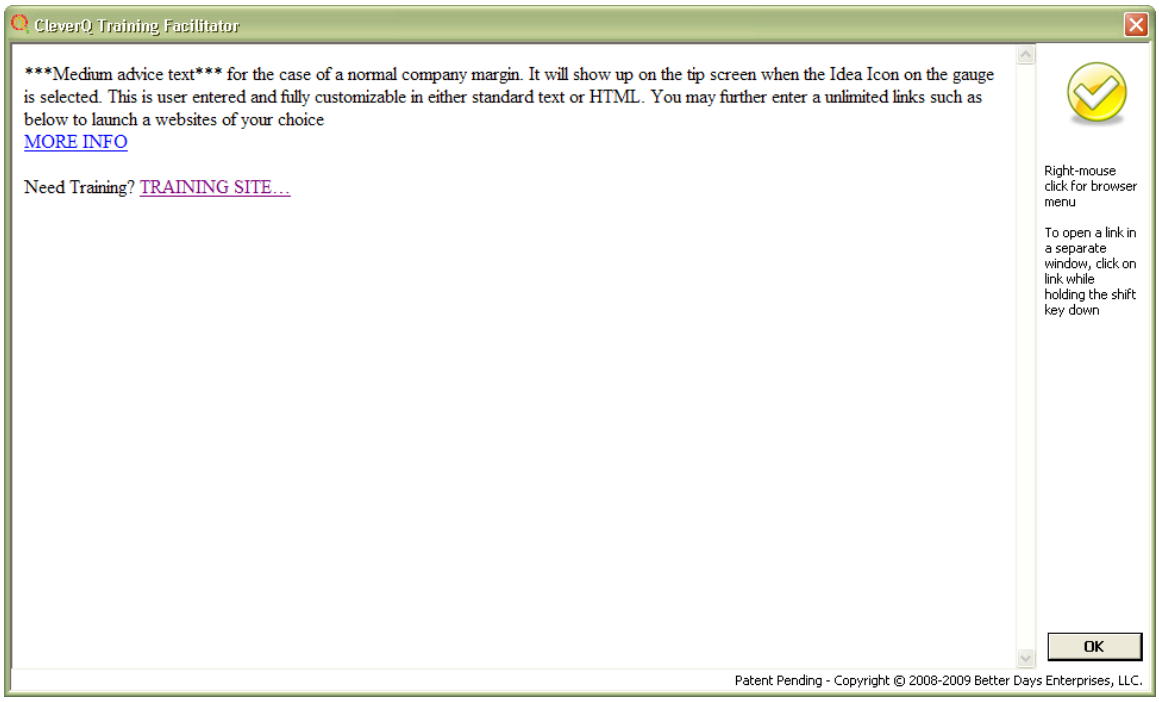
NOTE: When data from QuickBooks® is loaded, the process is very controlled and therefore it is save to not store zero values to save storage and processing time. So missing data is generally not the case with QuickBooks®. If it is missing, zero is assumed. But with data from other sources, any zero values must be loaded and stored. If the data does not exist, a warning icon will be displayed.

Gauge Tips

Some gauges will display an icon like this….

…to indicate a tip is available. Some gauges do not and you will need to use the right mouse submenu to display a tip. Tips are setup as part of the indicator or indicators. A tip is related to the value being displayed for the gauge and tips are setup based on

different ranges of values. When you display a tip, you will see the "CleverQ Training Facilitator" popup window displayed as illustrated in the following figure.


CleverQ Training Facilitator
Medium advice text for the case of a normal company margin. It will show up on the tip screen when the Idea Icon on the gauge is selected. This is user entered and fully customizable in either standard text or HTML. You may further enter a unlimited links such as below to launch a websites of your choice
MORE INFO
Need Training? TRAINING SITE…
Right-mouse click for browser menu
To open a link in a separate window, click on link while holding the shift key down
OK
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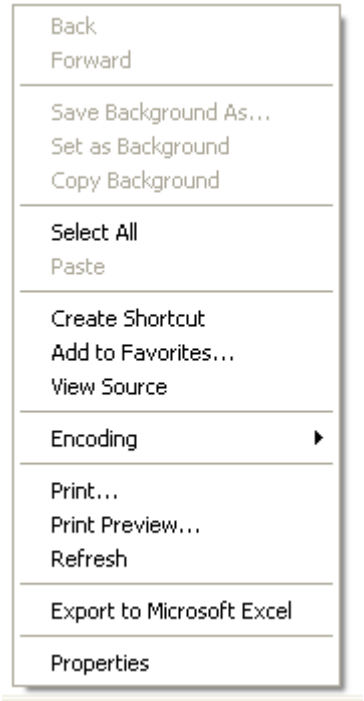
When a tip appears to be long, click into the text of the tip and a vertical scroll bar will appear to let you move through the text.

A tip may contain one or more links to a website to provide a way to get more information. Click on the link, and the webpage will be displayed right within the tip form. You can open a new window by holding down the shift key and clicking on the link. Since the tip window works like a web browser, additional functions are available when you right mouse click within the tip area.



Gauge Setup

Choosing the "Setup" from the gauge submenu will display the Gauge Detail form. The description of this form is covered in the "Customization" manual.

Gauge Options

Some gauges have different options while many have none.

Refreshing a Gauge

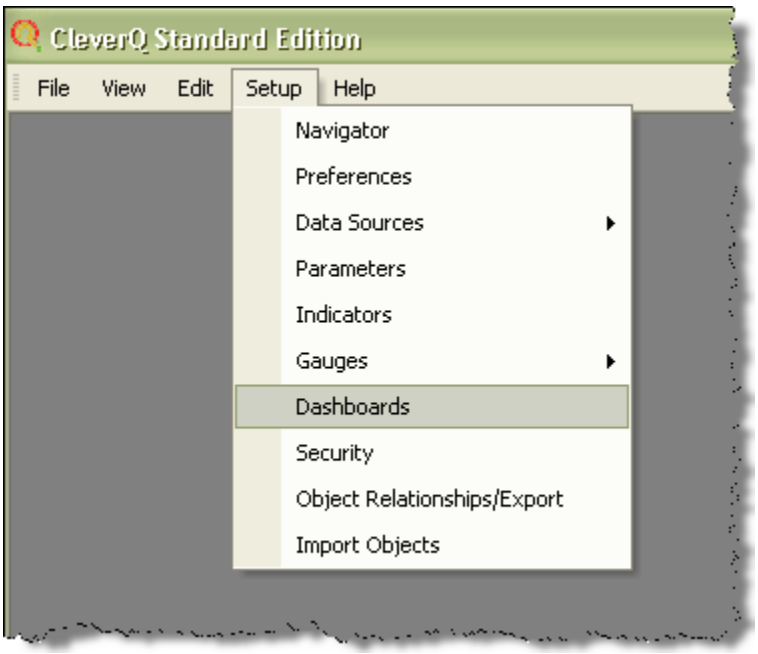
You can refresh a single gauge by selecting the "Refresh" option on the gauge's submenu.

Help on a Gauge

To understand how a gauge works, the "Help" option on the gauge's submenu will display a description of the gauge.

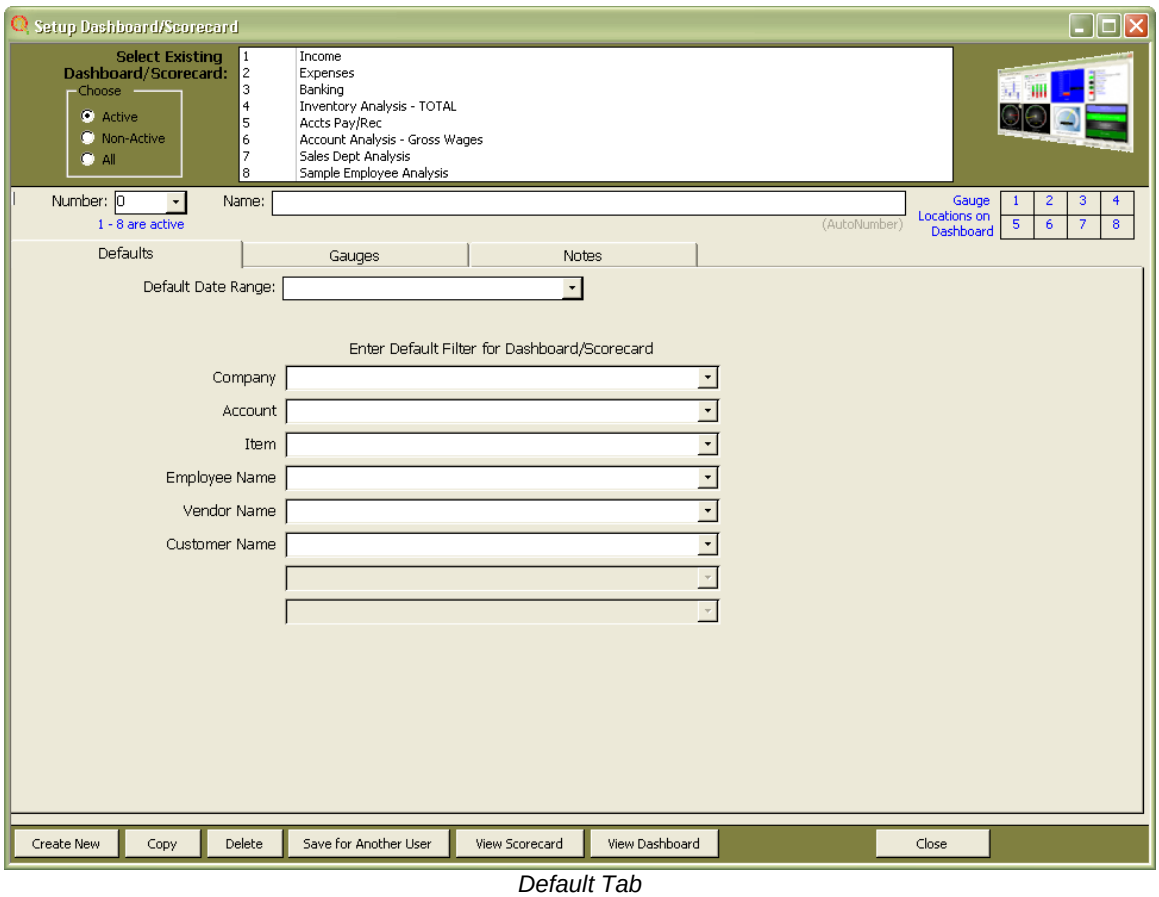
Changing Dashboards

While creating and setting up a gauge is beyond the scope of this manual, selecting gauges to display on a dashboard is easily done by the casual user. This is done by selecting the menu item "Setup – Dashboards"

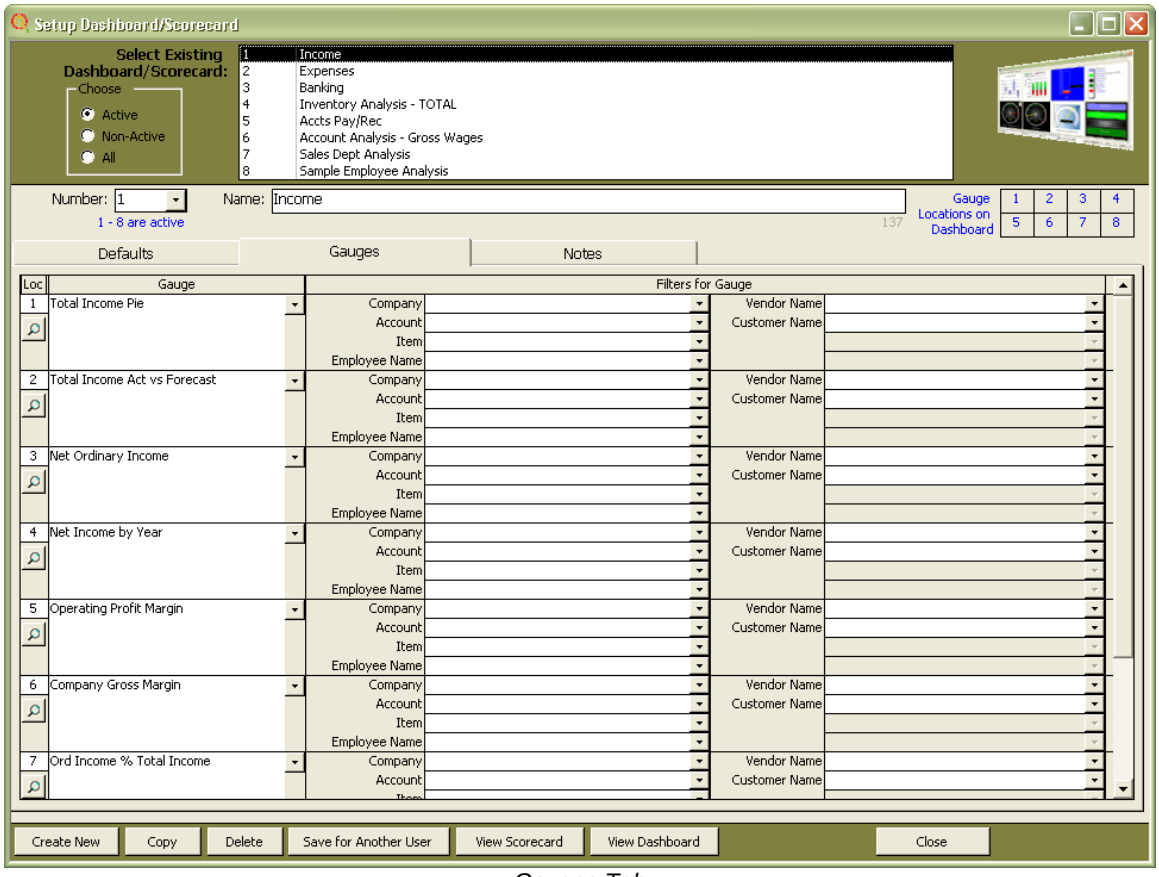


You will then get a form called “Dashboard Detail” as shown in the next figure.

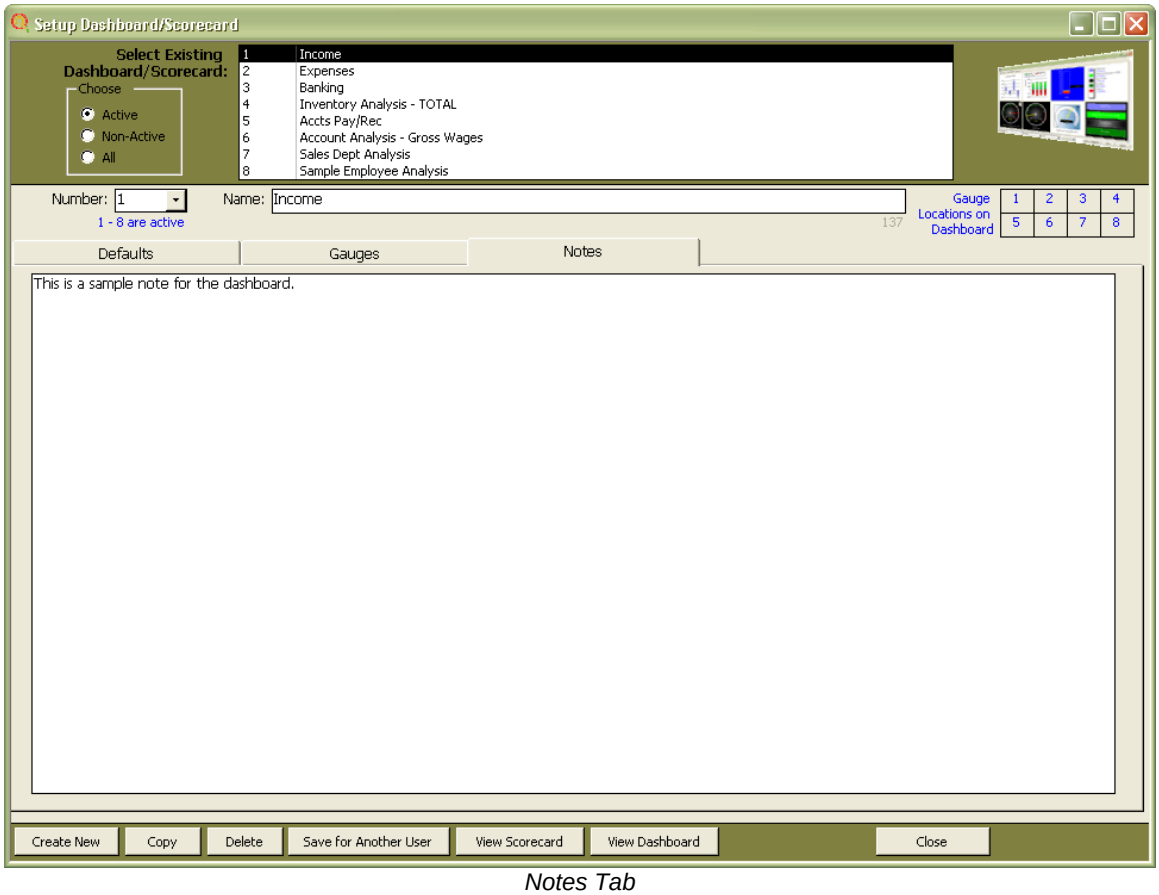
This form has three tabs: Defaults, Gauges, and Notes.



Default Tab


Setup Dashboard/Scorecard
Select Existing Dashboard/Scorecard:
Choose
Active
Non-Active
All
1 Income
2 Expenses
3 Banking
4 Inventory Analysis - TOTAL
5 Accts Pay/Rec
6 Account Analysis - Gross Wages
7 Sales Dept Analysis
8 Sample Employee Analysis
Number: 1
1 - 8 are active
Name: Income
137
Gauge Locations on Dashboard
1 2 3 4
5 6 7 8
Defaults
Gauges
Notes
Loc
Gauge
Filters for Gauge
1 Total Income Pie
2 Total Income Act vs Forecast
3 Net Ordinary Income
4 Net Income by Year
5 Operating Profit Margin
6 Company Gross Margin
7 Ord Income % Total Income
Company
Account
Item
Employee Name
Vendor Name
Customer Name
Create New
Copy
Delete
Save for Another User
View Scorecard
View Dashboard
Close

Gauges Tab



Notes Tab

On this form you can select the gauges you want to include on a particular dashboard as well as several other functions. The top of the form lists the currently selected 8 dashboards. Clicking on any one of these will display the gauges and parameters associated with that dashboard.

You can also have inactive dashboards. These have a number of zero instead of 1 through 8. You can see these by selecting the Non-active option on the top left of the form.

Renaming a Dashboard

The name of the dashboard is what appears on the tabs of the main dashboard form. To rename a dashboard, simple click on the dashboard on the top of the form. Then edit the Dashboard Name on the bottom of the form. Either closing the form or selecting another dashboard will save the changes.

Changing the Order

The list of existing dashboards on the top of the form are numbered and this is the order of the tabs on the main dashboard form. To reorder or renumber the dashboards, select a dashboard you want to move on the top of the form. Then change the number on the bottom of the form using the dropdown box labeled "Number". After making that change select another dashboard to move. Now enter a new number for that dashboard.

Continue to make whatever number changes you want, but make sure when you are done, you do not have any duplicate numbers or some of the dashboards will not be displayed.

Setting the Default Date Range

You can set the default date range of a dashboard or leave it blank. If you leave it blank, the dashboard will then use the Initial Date Range for each of its gauges. If there is no Initial Date Range for a gauge, then all dates are assumed. To set a default date range, select the dashboard and then simple use the dropdown list labeled "Default Date Range" to set it.

Setting the Default Filters

You can set the default filters or leave them blank. This will not override any filters set by an individual gauge on the Gauges Tab. They will only be used if a gauge does not have a filter set.

Removing Dashboards

With this form you can delete a previous saved dashboard. First select the dashboard to be deleted then press the "Delete" button.

Creating New Dashboards

To create a new dashboard, press the "Create New" button will clear out the main part of the Dashboard Detail form and automatically assign the next available active dashboard number if it is available, otherwise a zero will be assigned. At this point you will need to enter a Dashboard Name. Optionally you can enter a Default Date Range, Dept, and/or Note. You can also copy an existing dashboard to create a new one by pressing the "Copy" button.

Adding Gauges to Dashboards

To add gauges to the dashboard, you simple need to select from a pull down list of available gauges, the gauge you want. Once the gauges are selected for up to 8 locations, you are done. You do not have to have all 8 locations filled. For the user who wants to see the details of a gauge, the small button on the bottom of the gauge location can be used to open up the Gauge Detail form. Information on the Gauge Detail form is located in the Customization Manual.

Changing Gauges on Dashboards

To change a gauge on a dashboard, simply select the dashboard and reselect the gauge to be displayed in the desired location.

View Scorecard

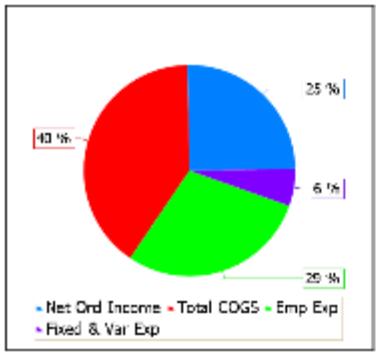
In addition to defining a dashboard to be displayed on the screen, you can also print a Scorecard report for any dashboard you define. Simple select a dashboard and press the "View Scorecard" button. You will get a print preview of the Scorecard similar to the format in the next figure.

CleverQ Reporter — Sample Company

Dashboard Num: 1 Dashboard/Scorecard Name: Income

Default Dashboard Date Range:

Gauge Location: 1 Gauge Name: Total Income Pie



Initial Date Range: Last 12 months
Current Date Range: Last 12 months
Data Type: Monthly
Filters:
☐ Lock Date Range

Ratio 1 ☐ Key Ratio

Indicator Name: Net Ordinary Income $
Indicator Formula: [Net Ordinary Income]
Current Value: $112,723
Value Details: Net Ordinary Income = 112,722.68
Benchmark: $0
Tip: Net Income meets or exceeds the goal of 25% of Gross profit.
Note: Business: Income from the normal day to day operations of the firm, and which specifically excludes income from sale of capital assets.

Ratio 2 ☐ Key Ratio

Indicator Name: COGS$Total
Indicator Formula: [Total COGS]
Current Value: $180,727
Value Details: Total COGS = 180,727.38
Benchmark: $0
Tip:
Note:

Ratio 3 ☐ Key Ratio

Indicator Name: Exp$Employee
Indicator Formula: [Total Expense Personal]
Current Value: $130,804
Value Details: Total Expense Personal = 130,804.28
Benchmark: $0
Tip:
Note:

Gauges

The fundamental element of the dashboard is the gauge. Gauges come in all types and flavors depending on the type of data to be displayed. Gauges can be business graphs

that show one or more values over time, text reports, or instruments like you would find on an automobile dashboard. These instruments could be analog types or digital types.

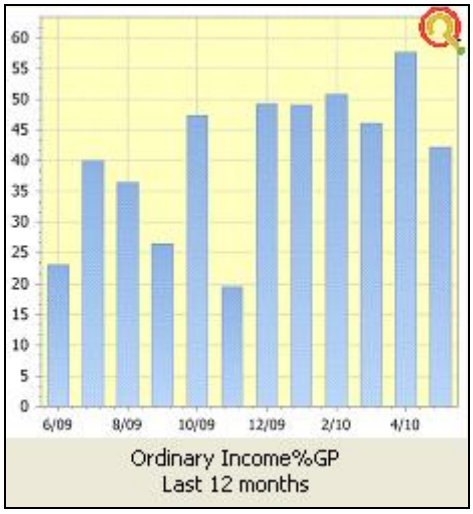
To understand how to create your own custom gauge, you will need to understand gauge types and then refer to the Customization manual for details on creating gauges.

The following section explains some of the gauge types available with the program. Others are available and new ones are added all the time.

Gauge Types

Bar Chart

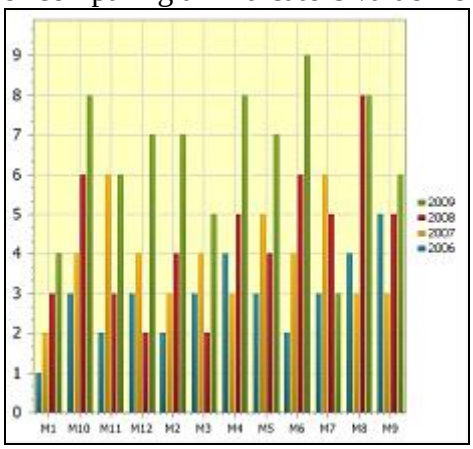
This vertical bar chart will display the value of an indicator over time with a bar for each time period.



Advice is given based on the last value displayed.

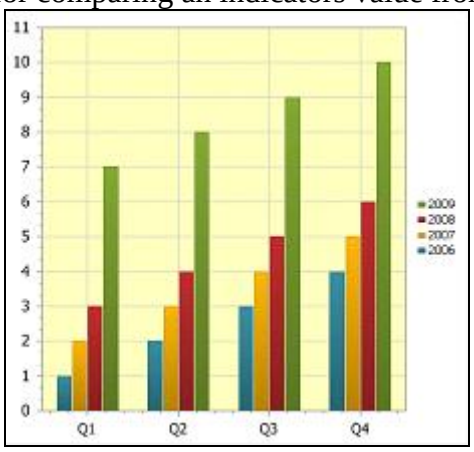
Bar Chart by Month by Year

This gauge will show a set of bars for each fiscal month where each bar represents a fiscal year. This is good for comparing an indicators value from year to year by month.



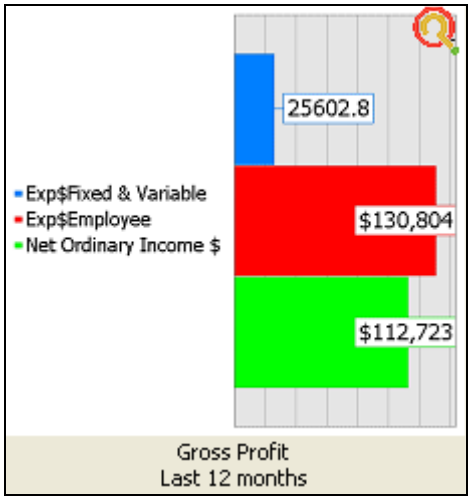
Bar Chart by Qtr by Year

This gauge will show a set of bars for each fiscal quarter where each bar represents a fiscal year. This is good for comparing an indicators value from year to year by quarter.



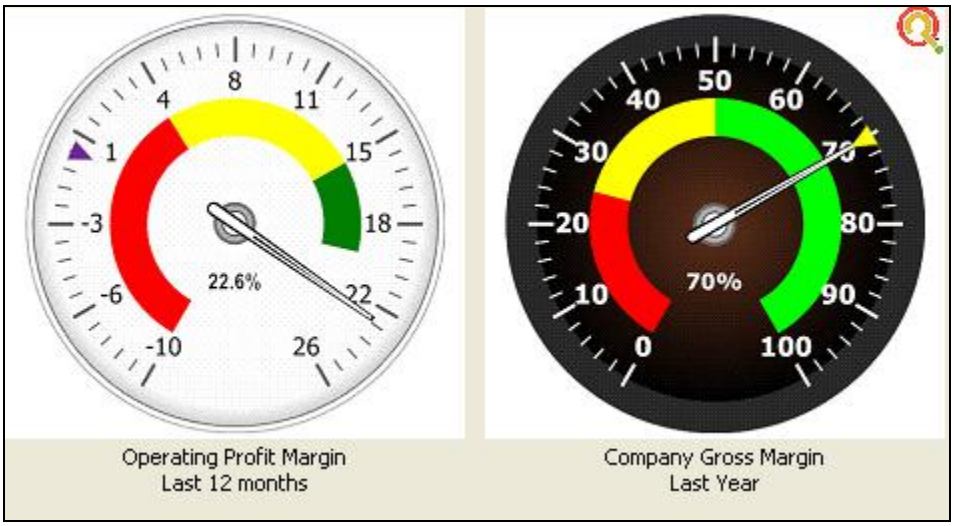
Bar Chart Ratios

The horizontal bar chart displays up to 10 ratios/indicators and graphically shows the value of each indicator.



Circular Meters

There are two circular meter gauges: Circular Meter and Circular Meter Deluxe. The operation of each gauge is identical. The only difference is the appearance. This circle meter is used to show a single indicator. The circle meter shows the value in the center of the gauge. The value is graphically shown with a needle. The range of the gauge is based on the min and max of the indicator, but will expand if the value goes out of range. A yellow arrow shows the median or benchmark value. A light blue bar shows the indicator's desired range. A multicolored bar shows the ranges with the colors as specified for the indicator.

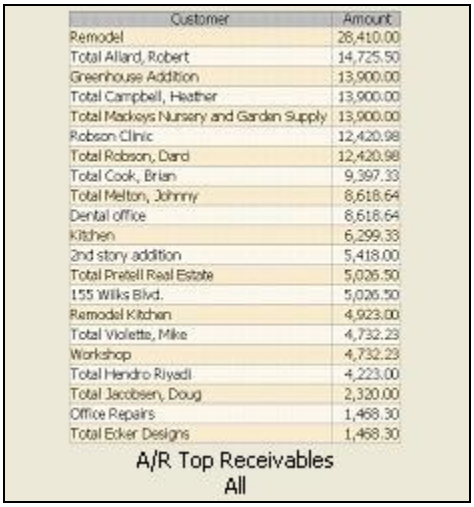


Data Query

This text based gauge returns a table of data based on the contents selected. Choices that have previously been setup as a system data view that include:

- Top A/R Customers
- Top A/P Vendors
- Top Salespeople by Month
- Top Selling Items

As an option to this gauge, you can select the number of records to display, so for example you can choose the Top 10 A/R Customers which would display the customers that owe the most amount of money.



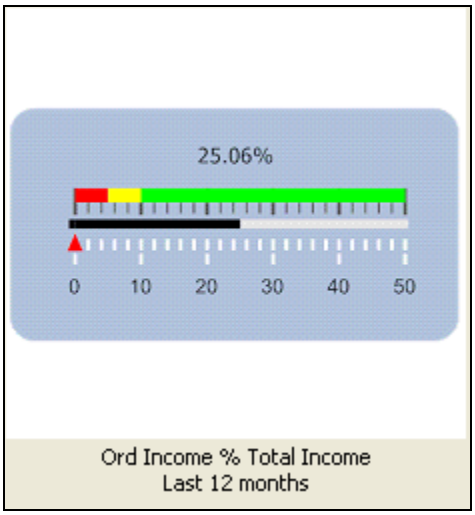
Customer	Amount
Remodel	28,410.00
Total Allard, Robert	14,725.50
Greenhouse Addition	13,900.00
Total Campbell, Heather	13,900.00
Total Mackeys Nursery and Garden Supply	13,900.00
Robson Clinic	12,420.98
Total Robson, Darci	12,420.98
Total Cook, Brian	9,397.33
Total Melton, Johnny	8,618.64
Dental office	8,618.64
Kitchen	6,299.33
2nd story addition	5,418.00
Total Pratell Real Estate	5,026.50
155 Wilks Blvd.	5,026.50
Remodel Kitchen	4,923.00
Total Violette, Mike	4,732.23
Workshop	4,732.23
Total Hendro Riyadi	4,223.00
Total Jacobsen, Doug	2,320.00
Office Repairs	1,468.30
Total Ecker Designs	1,468.30

A/R Top Receivables
All

Another option to this gauge is to setup your own data source using the “Contents” property. This is covered in more detail in the Customization manual.

Horizontal Bar – Standard

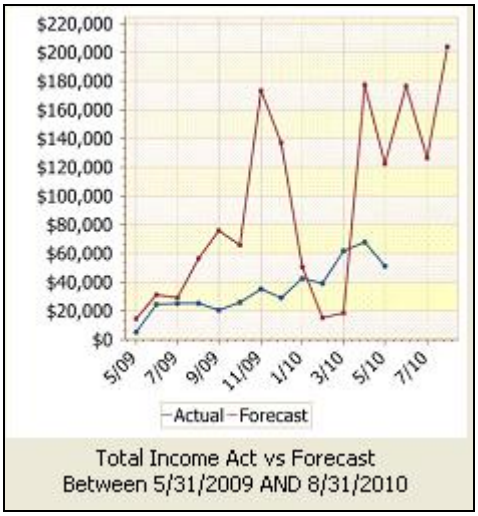
This meter is used to show an indicator. The horizontal bar gauge shows the value of an indicator on the top of the gauge. The value is graphically shown with a white bar in the center of the gauge. The range of the gauge is based on the min and max of the indicator, but will expand if the value goes out of range. A red arrow shows the median or benchmark value. A light blue bar shows the indicator's desired range. A multicolored bar shows the ranges with the colors as specified for the indicator.



Line Charts

There are five different line chart gauges available as listed in the following table.

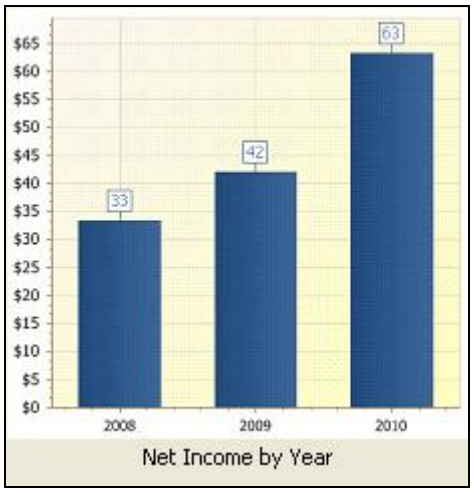
Gauge Name	Gauge Description
Line Chart	This line chart will display the value of a indicator over time with a point for each time period
Line Chart – 10 Lines	This line chart will display the value of up to 10 indicators over time with a point for each time period
Line Chart - 2 Lines	This line chart will display the value of two indicators over time with a point for each time period. This gauge is particularly good for displaying a indicator with actuals and a second indicator with the forecast. Other options include the # Periods to display in Past and Future. When a date range is selected, the end date in the date range determines the point where the # Periods to display in Past and Future are determined.
Line Chart Past Future	This gauge that shows a single line with ratio1 being used for past dates and ratio2 used for future dates. Typically used for actuals and then forecasts. This would appear as a single line with the color changing on the current date.
Line Chart with Previous Period	This line chart will display the value of a indicator over time with a point for each time period. A second line is created based on the previous period.
Line Chart with Ranges	This line chart will display the value of a indicator over time with a point for each time period. Additional lines and areas are displayed to show desired ranges, benchmark, and value ranges.

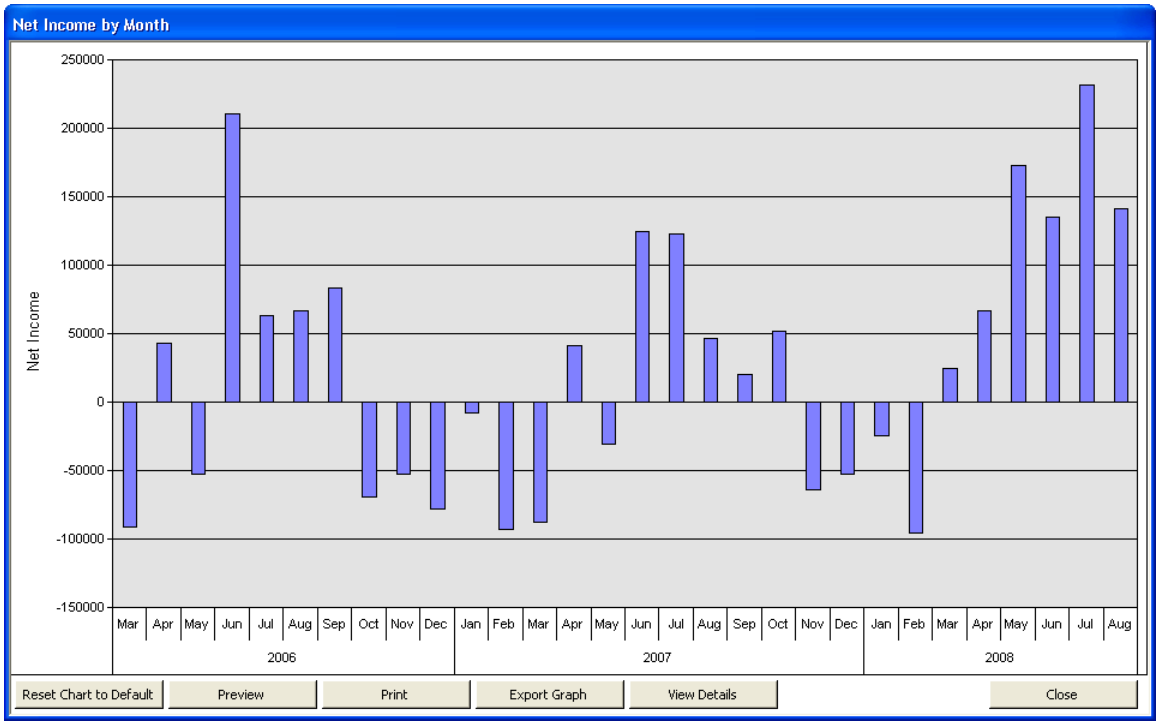


Advice is given based on the last value displayed.

Net Income by Year

This graph shows the value of net income by year. You can drill down to get a larger graph that shows the net income by month. Drilling down on the larger graph will give you a pivot table of the Profit and Loss statement.



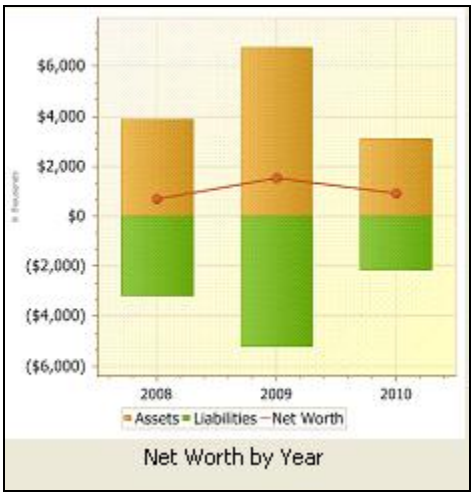


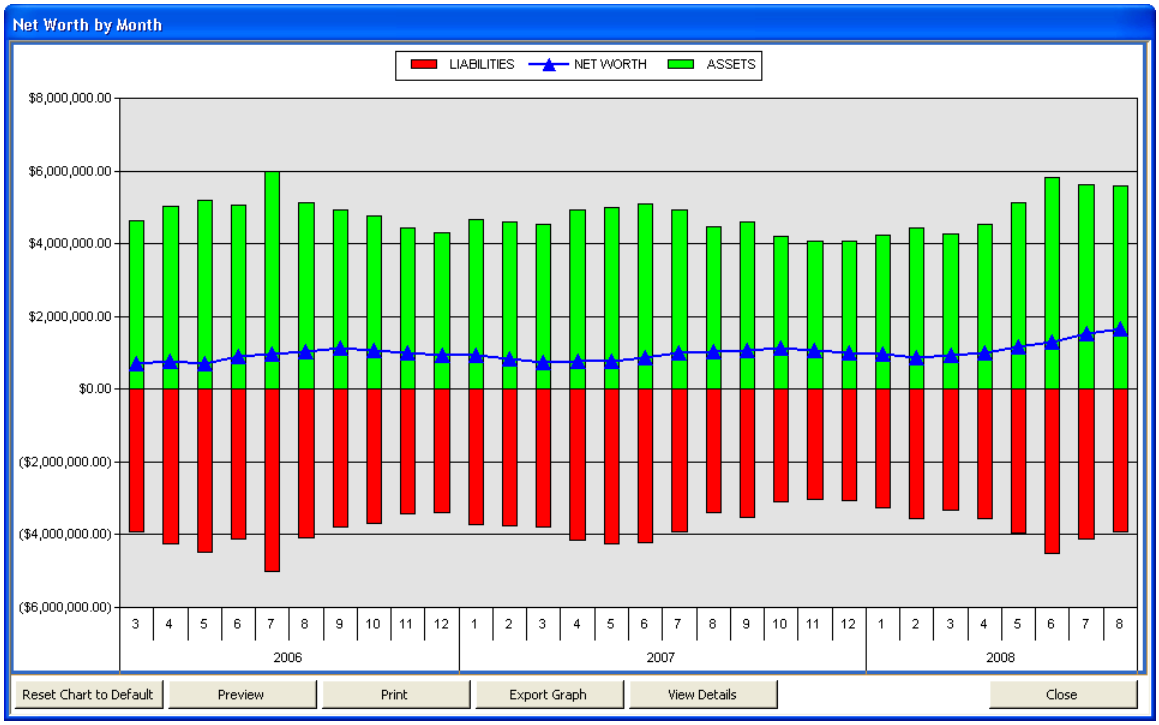
Net Income by Year – Standard Drilldown

Various options and features exist with the Pivot Chart. Refer to a later section in this manual for details.

Net Worth by Year

This graph shows the value of assets, liabilities, and net worth by year. You can drill down to get a larger graph that shows the same items on a monthly basis. Drilling down on the larger graph will give you a pivot table for the Balance Sheet.



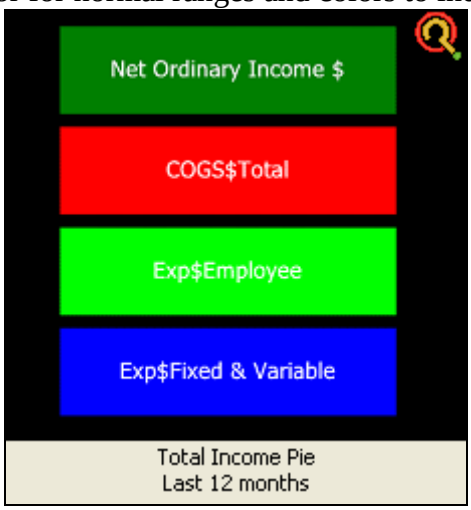


Net Worth by Year - Standard Drill Down

Various options and features exist with the Pivot Chart. Refer to a later section in this manual for details.

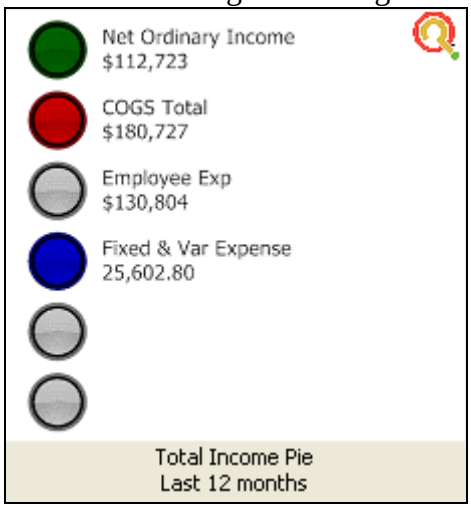
Panel Indicators

There are two different gauges used as panel indicators: one can display 4 indicators and the other 6 indicators. The indicators are colored based on the value of the indicator and where it falls with the defined ranges. The name of the indicator is displayed on the indicator. Use a black color for normal ranges and colors to indicate an alert.



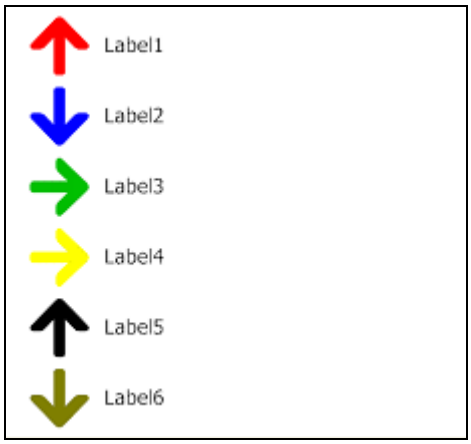
Panel Lights

This gauge is used to show up to 6 indicators. The lights are colored based on the value of the indicator and where it falls with the defined ranges. The name of the indicator and the value of the indicator are shown to the right of the light.



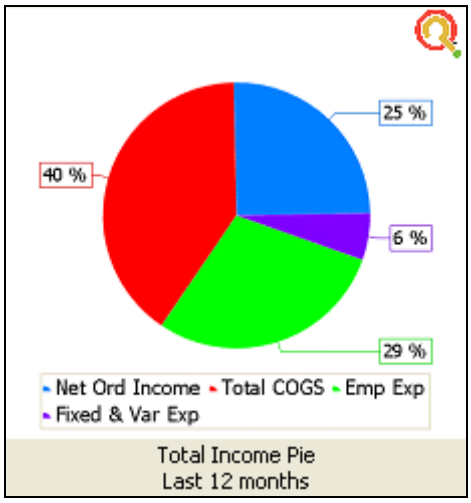
Panel Arrows

This gauge is used to show up to 6 indicators. The indicators include an arrow that will point up if the indicator value as gone up from the previous period. There will be a down arrow if the value has gone down, and a right pointing arrow if there is no change.



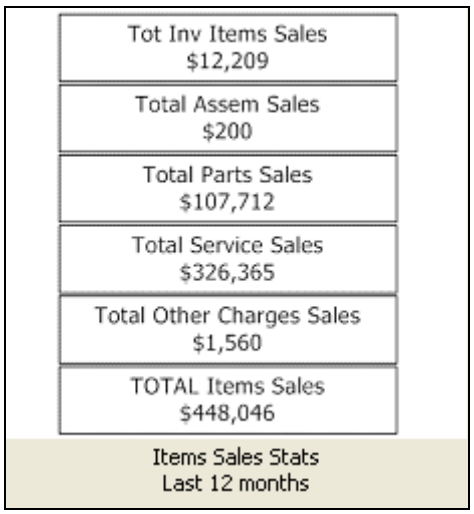
Pie Chart

The gauge plots up to 10 indicators in a pie chart format to illustrate the contribution of each indicator to a total.



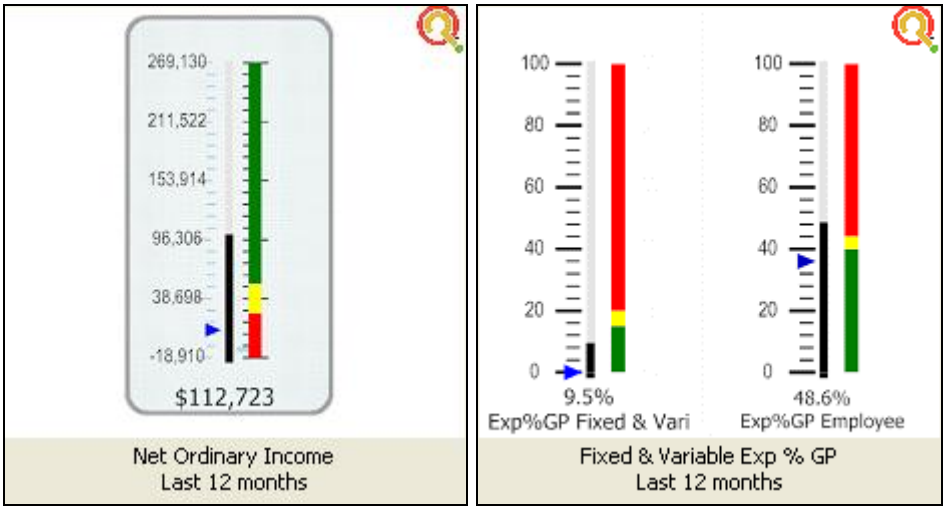
Text

This gauge is used to show up to 6 indicators. The name and the value are shown for each indicator.



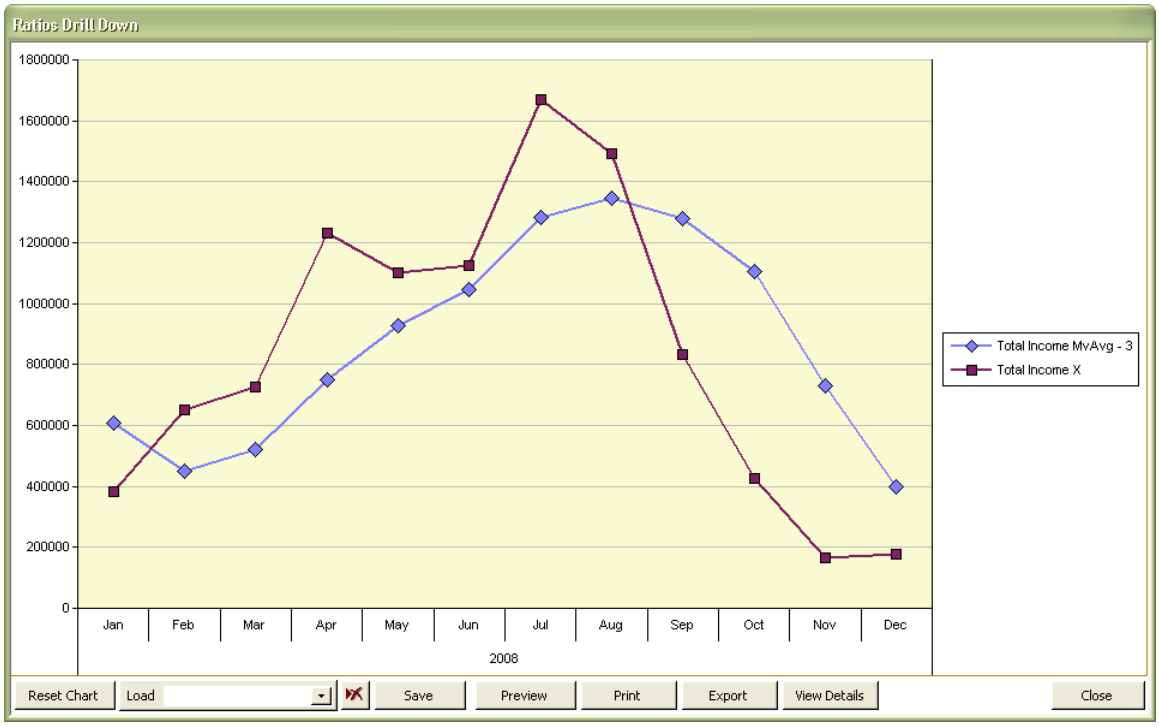
Vertical Bars

This gauge is used to show an indicator. The vertical bar gauge shows the value of an indicator on the bottom of the gauge. The value is graphically shown with a black bar in the center of the gauge. The range of the gauge is based on the min and max of the indicator, but will expand if the value goes out of range. A blue arrow shows the median or benchmark value. A light blue bar shows the indicator's desired range. A multicolored bar shows the ranges with the colors as specified for the indicator. A tip icon appears in the top right to indicate some advice is available based on the range the value is in.



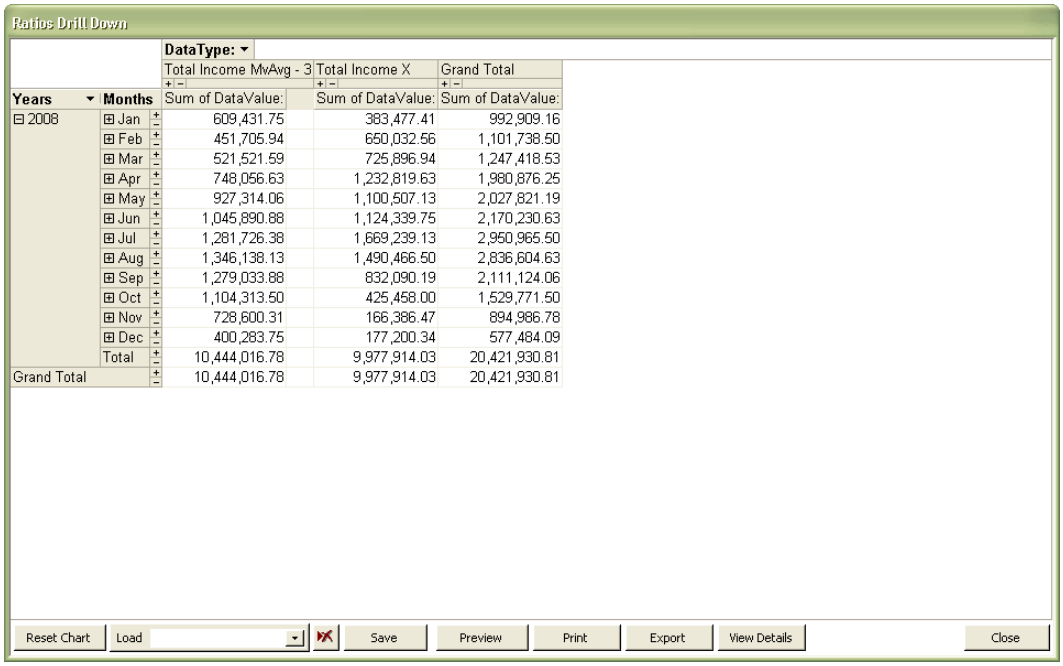
Working with Pivot Charts

From a number of locations within the software, you will get a "Pivot Chart" similar to what is displayed in the following figure. A "Pivot Chart" is an interactive way to look at your data. You can control various properties of the chart.

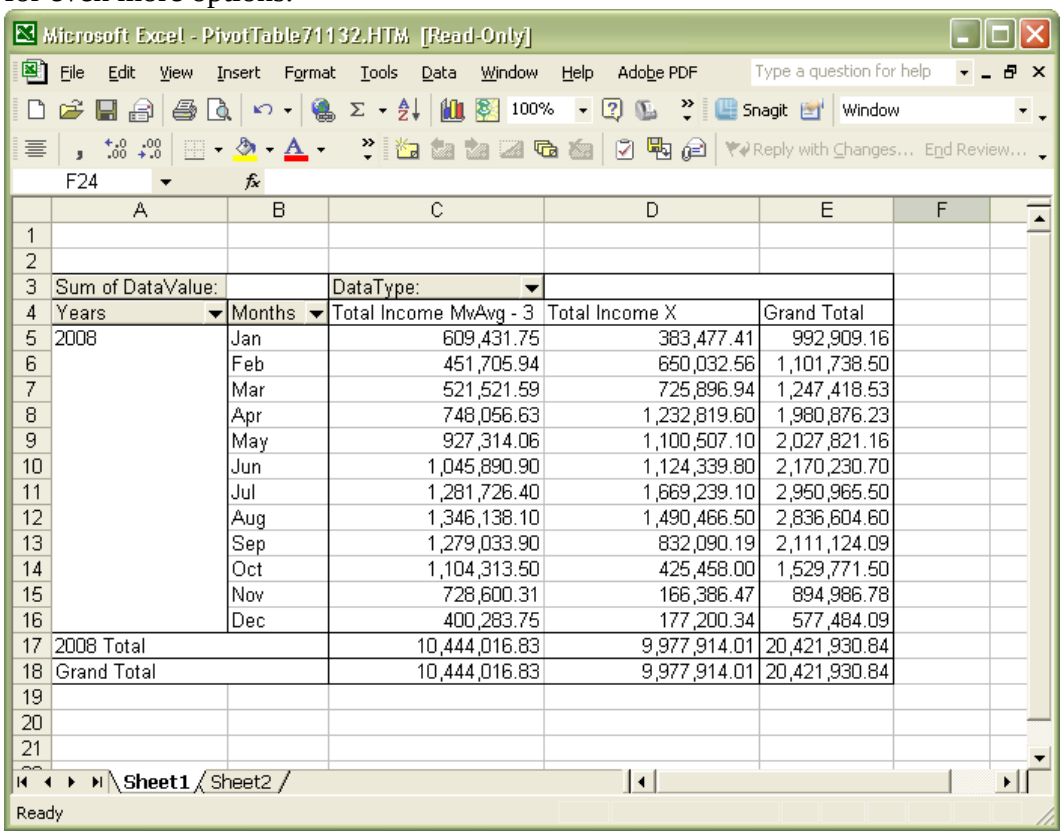


You can preview this chart by pressing the "Preview" button. This shows you what you will see if you print it. By pressing the print button, you will be shown a print dialog, where you can set different printing options. The "Export" button will put a copy of the image of this chart onto the clipboard. This will give you the ability to paste it into a Word Document, PowerPoint presentation, Excel worksheet, or any other program.

The View Details button will display the underlining data behind the chart in a Pivot Table format.



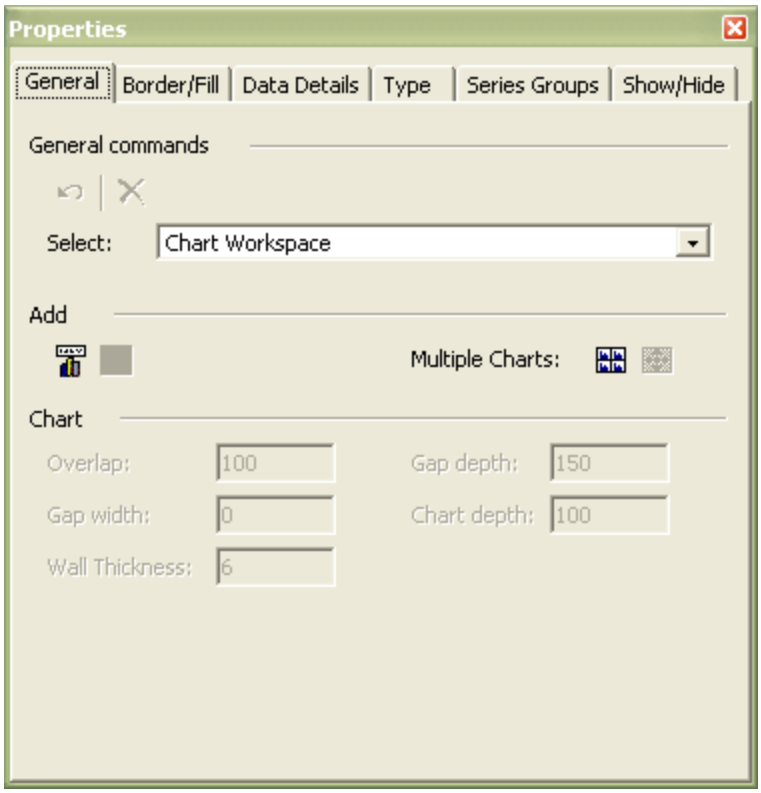
Now if you press the “Export” button, you can send this data directly to Microsoft Excel for even more options.



The more interesting feature of this Pivot Chart is the ability to change the properties of it. This can be done in one of three ways (depending on the version of Access you are using).

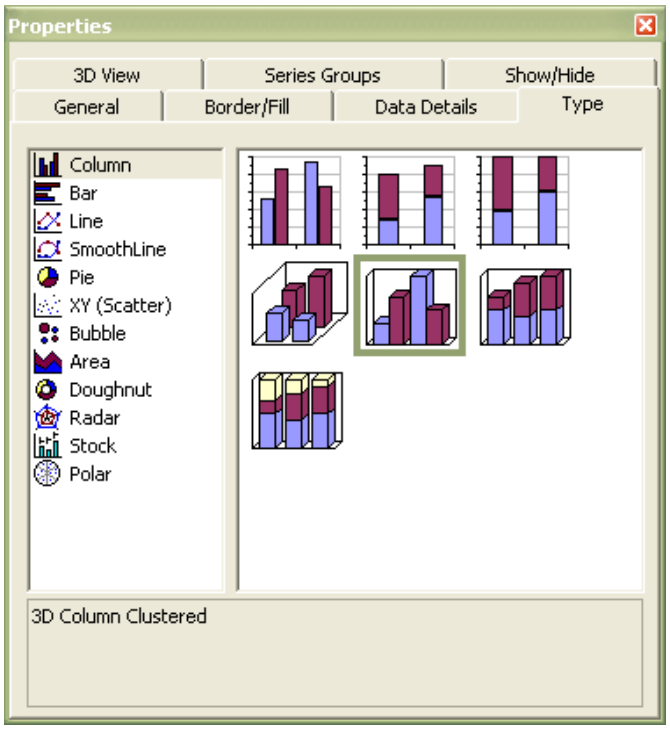
1. By right clicking on some object on the chart, you can select "Properties" and a property dialog box will appear. Depending on where and what you click on, the properties available will be different.
2. If you are using Access 2007 or later, press Alt-Enter to get to the Properties dialog box.
3. Press the Properties button on the bottom of the form.

For example, if you right mouse click on the white area to the right, you will get this dialog box.

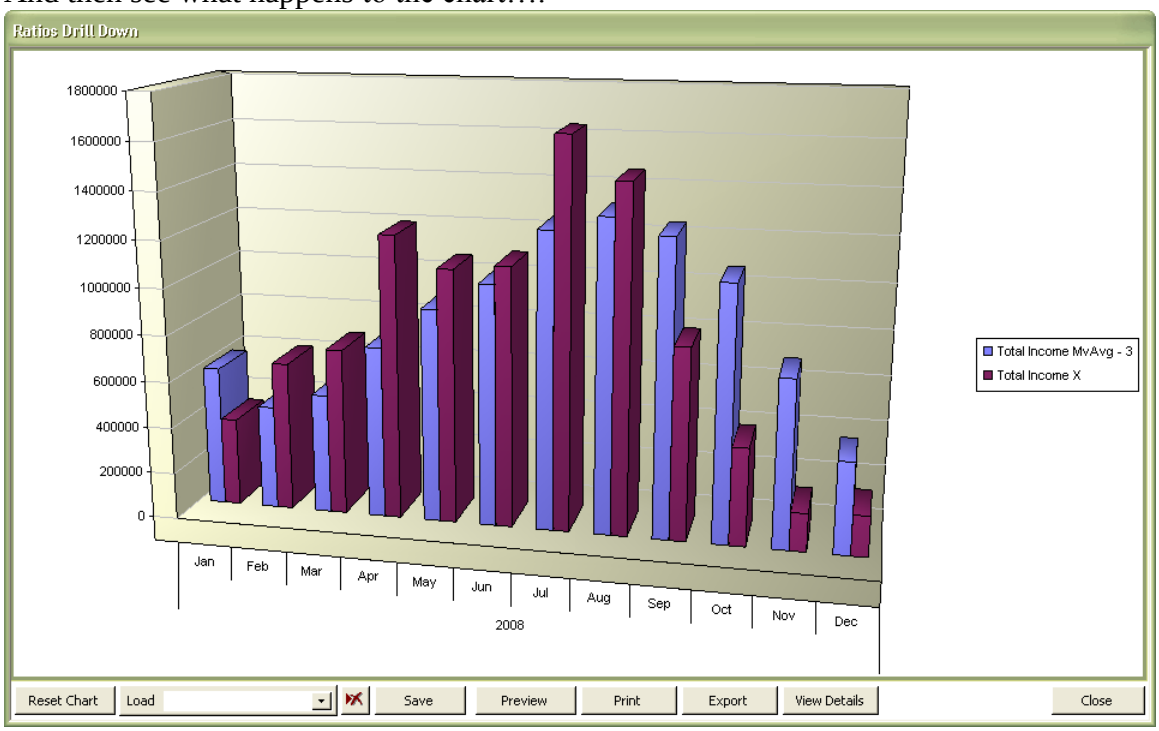


On the general tab you can select what object on the chart you want to change. This can include not only the chart itself as a whole, but also legends, axis, grids, and the plot line.

For the chart workspace, select the "Type" tab and then change the chart type. For example, change it to a 3D Column Chart.

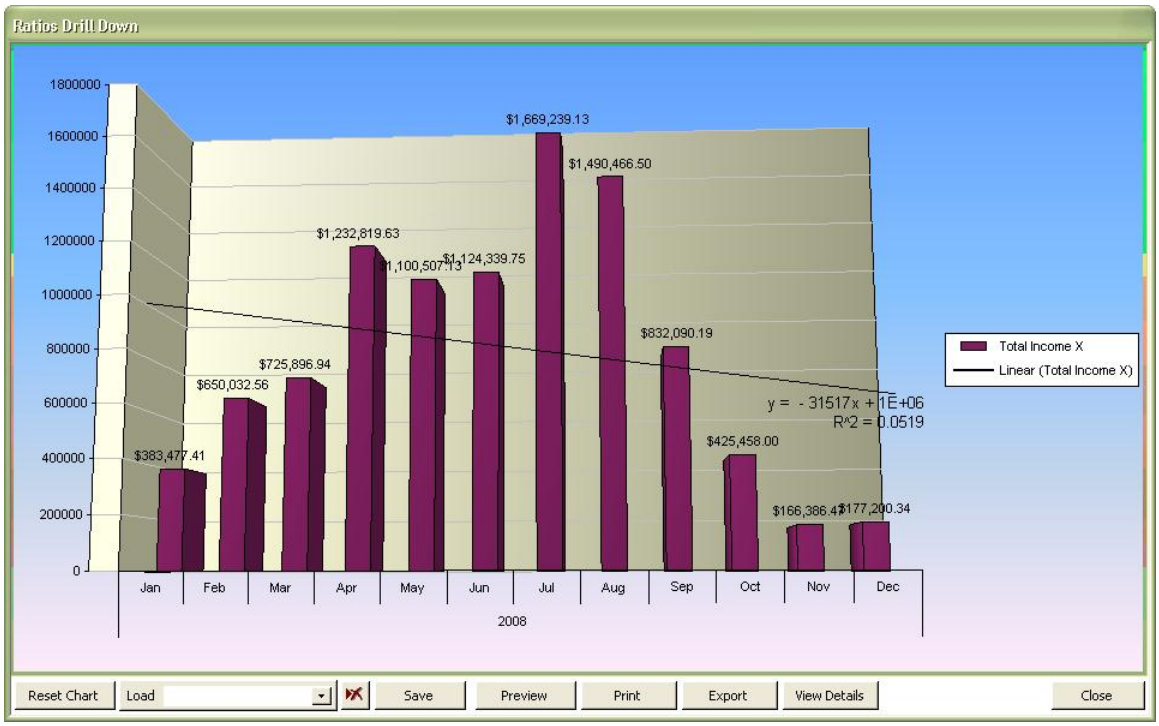


And then see what happens to the chart….



Use the 3D tab on the properties to change various effects on the chart. You can also change text sizes, fonts, colors, backgrounds, etc.

Let's say you want change the background to a gradient, add values to the bars, and add a linear regression trend line. The result could look something like this…



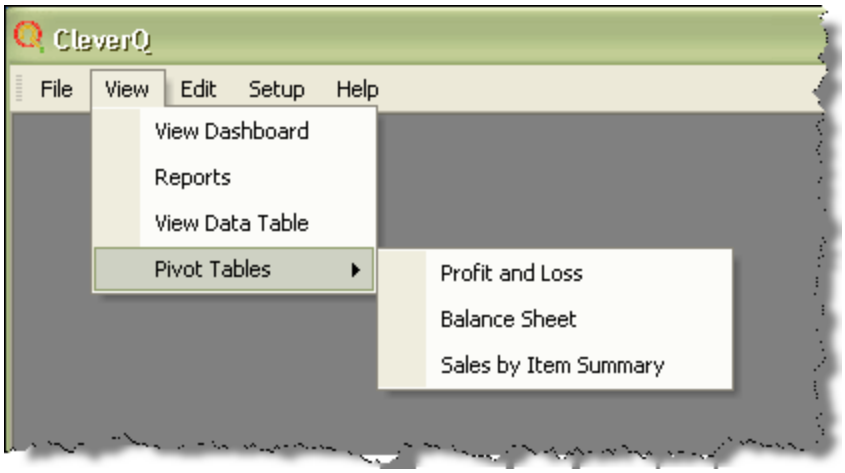
Now you can print or export your customized graph. At any time, to restore the graph to the original version, simply press the "Reset Chart to Default".

To save your customization, press the Save button. This will save the formatting under a name you specify. You can then use this formatting the next time you view the chart for the particular gauge. You can save any number of formats, and depending on what the chart is used for, they formatting may be available at other times. To load a previously saved format, use the dropdown list next to the "Load" label. To remove a saved format, load the format first, and then press the delete button.

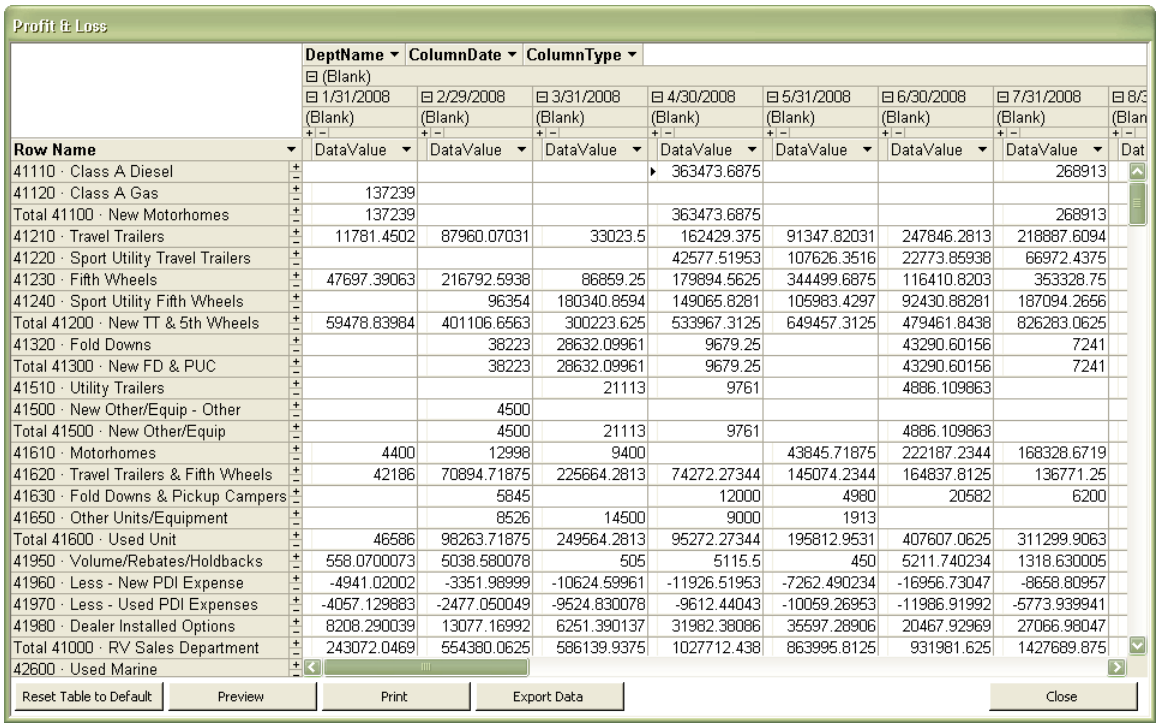
For further information about Pivot Charts, go online and search "Microsoft Access Pivot Charts".

Working with Pivot Tables

At various places in the software, you can display your data as a "Pivot Table". This includes the menu item View – Pivot Tables. From this menu item you will be prompted for a data range and then be able to see the pivot table for your selection.



An example is shown below. Here you can view or print the data. You can also expand or collapse various elements of the table as well as filter the data using the dropdown selections.



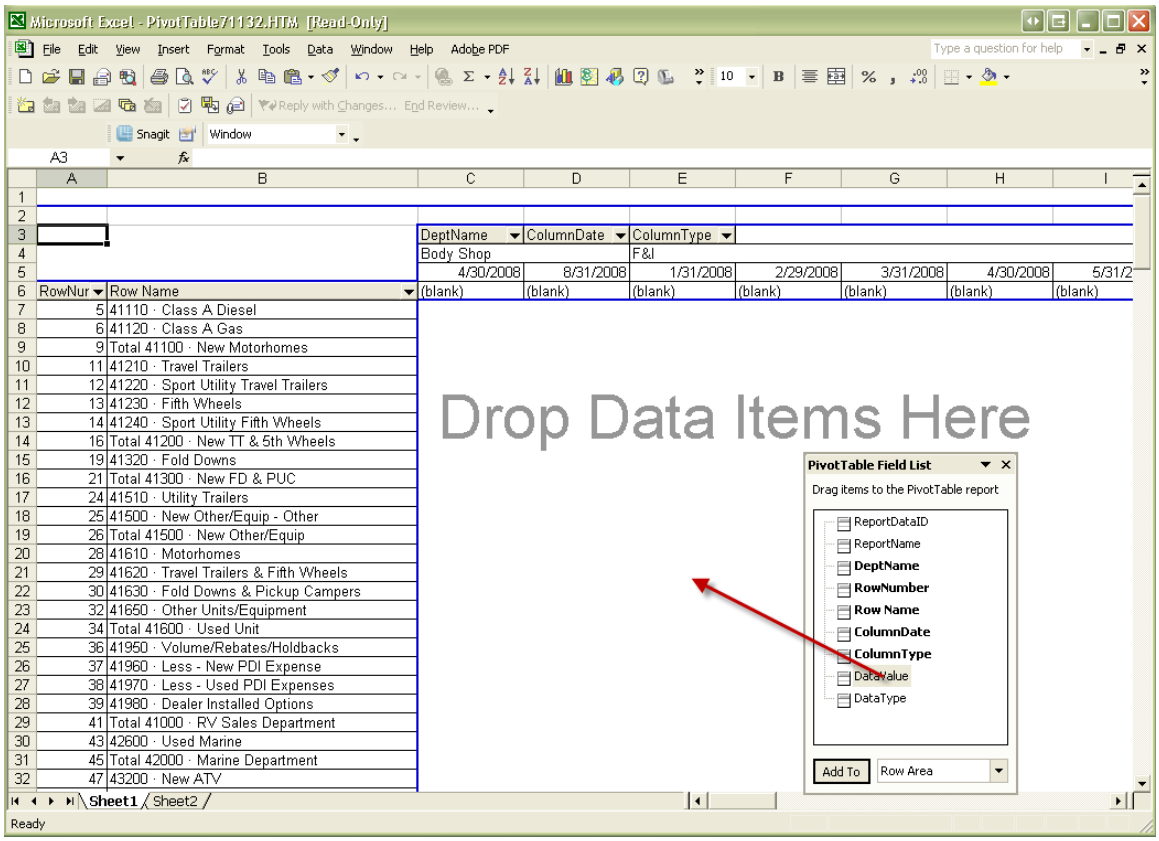
Row Name	1/31/2008 (Blank) DataValue	2/29/2008 (Blank) DataValue	3/31/2008 (Blank) DataValue	4/30/2008 (Blank) DataValue	5/31/2008 (Blank) DataValue	6/30/2008 (Blank) DataValue	7/31/2008 (Blank) DataValue
41110 · Class A Diesel				363473.6875			268913
41120 · Class A Gas	137239						
Total 41100 · New Motorhomes	137239			363473.6875			268913
41210 · Travel Trailers	11781.4502	87960.07031	33023.5	162429.375	91347.82031	247846.2813	218887.6094
41220 · Sport Utility Travel Trailers				42577.51953	107626.3516	22773.85938	66972.4375
41230 · Fifth Wheels	47697.39063	216792.5938	86859.25	179894.5625	344499.6875	116410.8203	353328.75
41240 · Sport Utility Fifth Wheels		96354	180340.8594	149065.8281	105983.4297	92430.88281	187094.2656
Total 41200 · New TT & 5th Wheels	59478.83984	401106.6563	300223.625	533967.3125	649457.3125	479461.8438	826283.0625
41320 · Fold Downs		38223	28632.09961	9679.25		43290.60156	7241
Total 41300 · New FD & PUC		38223	28632.09961	9679.25		43290.60156	7241
41510 · Utility Trailers			21113	9761		4886.109863	
41500 · New Other/Equip - Other		4500					
Total 41500 · New Other/Equip		4500	21113	9761		4886.109863	
41610 · Motorhomes	4400	12998	9400		43845.71875	222187.2344	168328.6719
41620 · Travel Trailers & Fifth Wheels	42186	70894.71875	225664.2813	74272.27344	145074.2344	164837.8125	136771.25
41630 · Fold Downs & Pickup Campers		5845		12000	4980	20582	6200
41650 · Other Units/Equipment		8526	14500	9000	1913		
Total 41600 · Used Unit	46586	98263.71875	249564.2813	95272.27344	195812.9531	407607.0625	311299.9063
41950 · Volume/Rebates/Holdbacks	558.0700073	5038.580078	505	5115.5	450	5211.740234	1318.630005
41960 · Less - New PDI Expense	-4941.02002	-3351.98999	-10624.59961	-11926.51953	-7262.490234	-16956.73047	-8658.80957
41970 · Less - Used PDI Expenses	-4057.129883	-2477.050049	-9524.830078	-9612.44043	-10059.26953	-11986.91992	-5773.939941
41980 · Dealer Installed Options	8208.290039	13077.16992	6251.390137	31982.38086	35597.28906	20467.92969	27066.98047
Total 41000 · RV Sales Department	243072.0469	554380.0625	586139.9375	1027712.438	863995.8125	931981.625	1427689.875
42600 · Used Marine							

There are two ways to export the data to Excel:

1 – Make a selection of all (Ctrl-A) or part of the table and do the following…

Press Ctrl – C (Copies to clipboard)
Now go to a blank Excel Worksheet
Press Ctrl – V (Pastes to program)

2 - You can also export the pivot table into Excel and end up with a Pivot table by pressing the “Export Data” button.



After Excel automatically opens, drag the item “DataValue” from the Pivot Table Field List to the section of the worksheet labeled “Drop Data Items Here”.

Reports

Refer to the separate Report Manager User Manual to learn about the Report Manager.